



IQVIA Quarterly Pharmaceutical Market Outlook

Quarterly Report: November 2023
Data Month Ending: September 2023

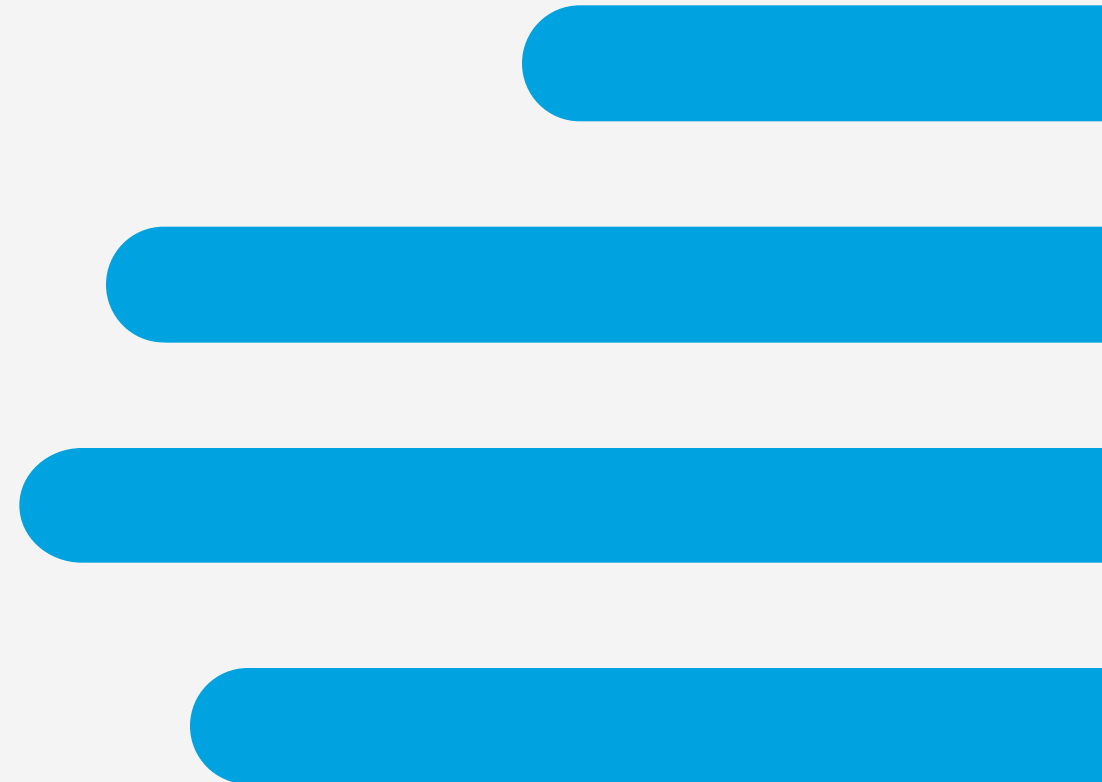
European Thought Leadership



IQVIA Quarterly Pharmaceutical Market Outlook

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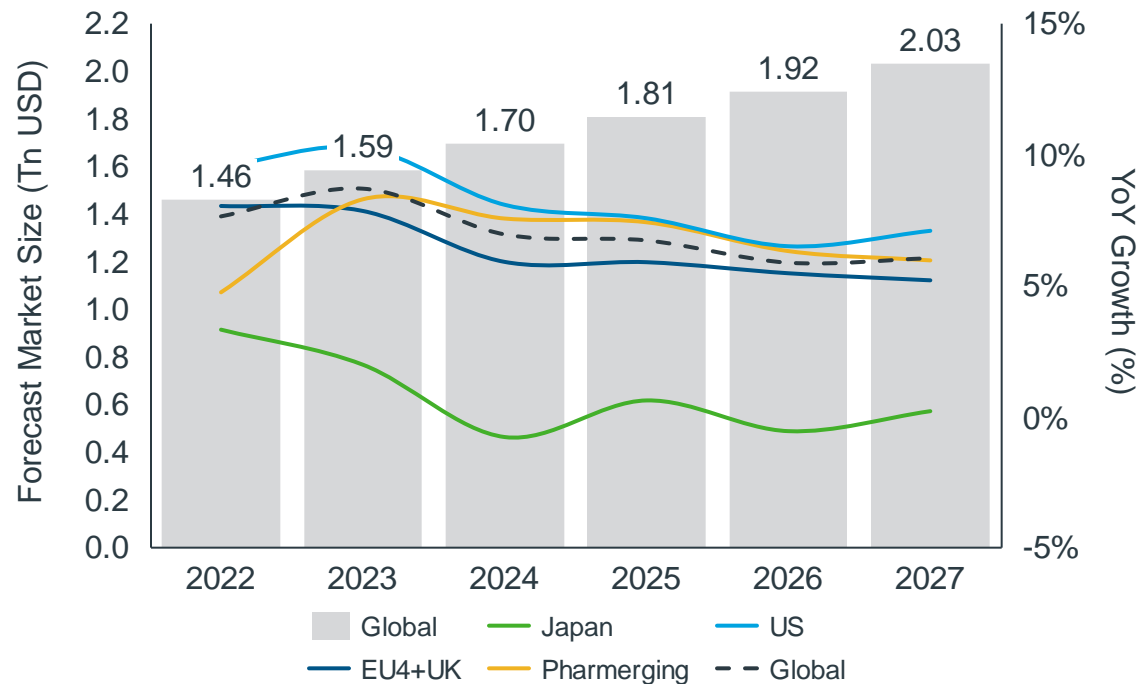
Global Market Prognosis



The global pharma market, excluding vaccines, is expected to reach \$2,030 billion by 2027 at a CAGR of ~7%, at constant exchange rates

Innovative new products are driving market growth in developed markets

Pharmaceutical Sales 2022-27* (Tn USD)



Cohort Growth Rates (CAGR 2022-27**)

Developed	6-7%		Pharmerging	7-8%	
US	7-8%	●	China	3-4%	●
Japan	0-1%	●	Brazil	9-10%	●
Germany	5-6%	●	Russia	6-7%	●
UK	6-7%	●	India	9-10%	●
France	5-6%	●	Turkey	33-34%	●
Italy	6-7%	●	Mexico	7-8%	●
Spain	6-7%	●			
Canada	7-8%	●			

Key	Developed markets	>8% ●	6-8% ●	<6% ●
	Pharmerging markets	>9% ●	7-9% ●	<7% ●



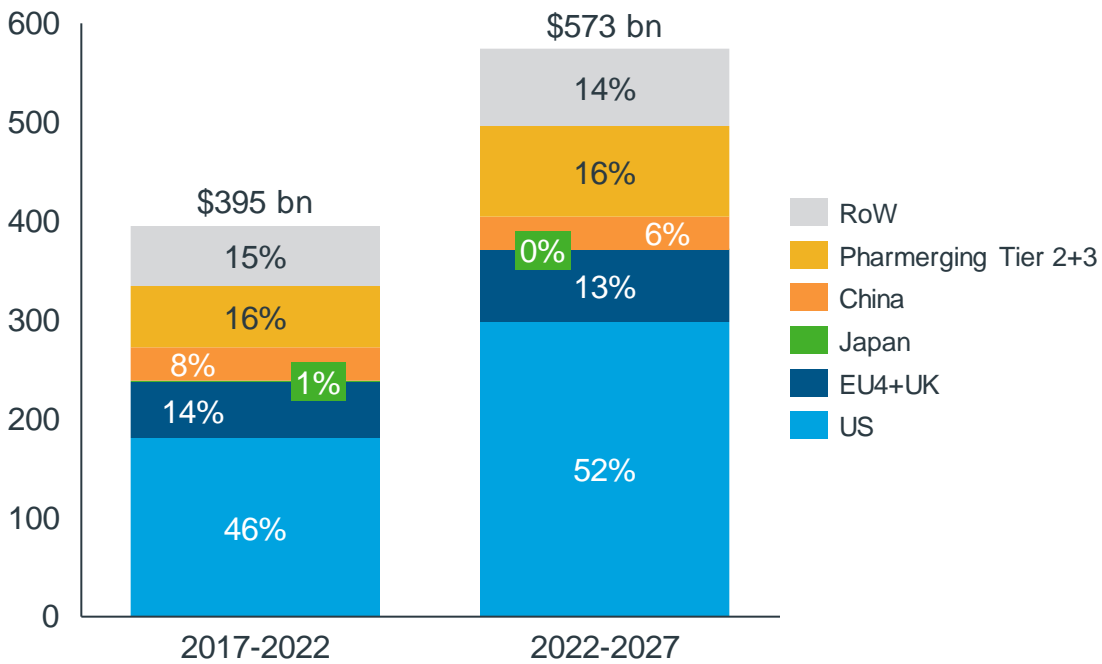
- The **strongest drivers** for the growth of developed markets through to 2027, primarily include the **launch of innovative new products** (e.g., novel therapies for the treatment of **cancer, rare diseases, chronic diseases**, such as novel monoclonal antibodies), and **improved measures for accelerating market access** to innovative drugs
- Several **premium-priced innovative drugs are expected to be launched in EU4 and UK** in the forecast period, driving market value growth. Among EU4+UK, the highest growth contributor is Germany, accounting for 4.5% of aggregate increase in sales

Note: Growth calculated using constant exchange rates; list prices used in all calculations; *Argentina excluded due to hyperinflation, **5-year growth rates from 2022 to 2027
 Rebates and discounts are not considered. Contains Audited + Unaudited data; Growth considered on par if there is overlap between country and region CAGR ranges; Developed markets refer to EU4+UK, Japan, US and Canada; Source: IQVIA EMEA Thought Leadership; Market Prognosis Sep 2023

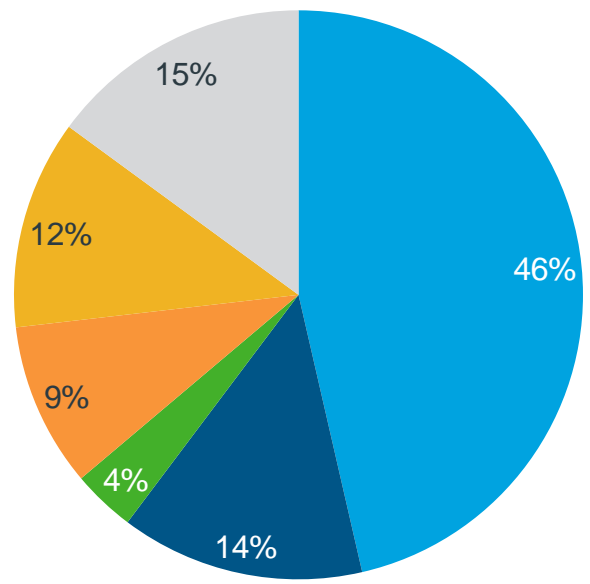
The US will continue to have the highest global value excluding vaccines; EU4 + UK will contribute 13% to the global market growth over 2022-2027

The contribution from smaller pharmerging countries is increasing

Regional contribution to growth (USD)



2027 regional market share (Total sales value: \$2.0 Tn)

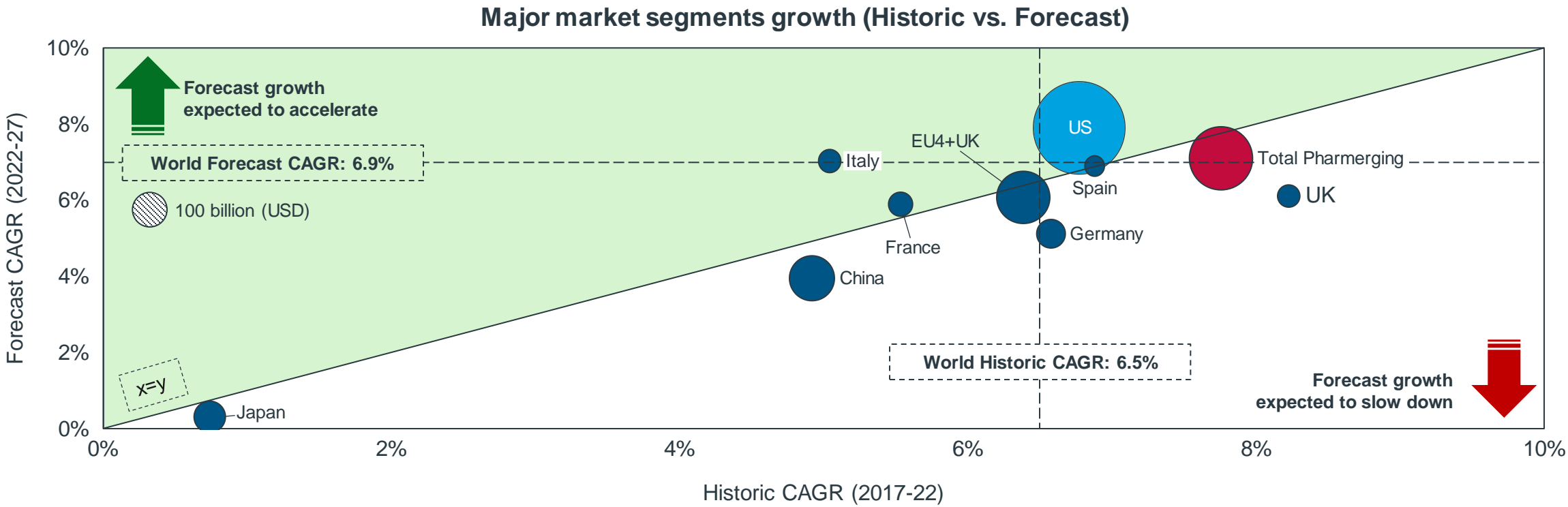


- The **major developed pharmaceutical markets** will jointly **contribute 57.6% to growth globally**, over the forecast period, excluding vaccines. The **high R&D spending and robust approvals in the US** will continue to support the entry of innovative drugs, fostering growth
- The **growth contribution of EU4 and UK remains consistent** across the two forecast periods 2017-2022 and 2022-2027, which could be **attributed to the cost containment measures** implemented to control rising pharmaceutical expenditure and slow economic growth

Notes: Growth calculated using constant exchange rates, 2027 market share calculated in Constant USD; Ex-manufacturer prices. Not including rebates and discounts; Contains Audited + Unaudited data
 Argentina excluded due to hyperinflation; Source: IQVIA EMEA Thought Leadership; Market Prognosis Sep 2023

Growth across major market segments is expected to accelerate through to 2027, exclusive of vaccines

Major patent expiries and subsequent biosimilar competitions are expected to affect market growth



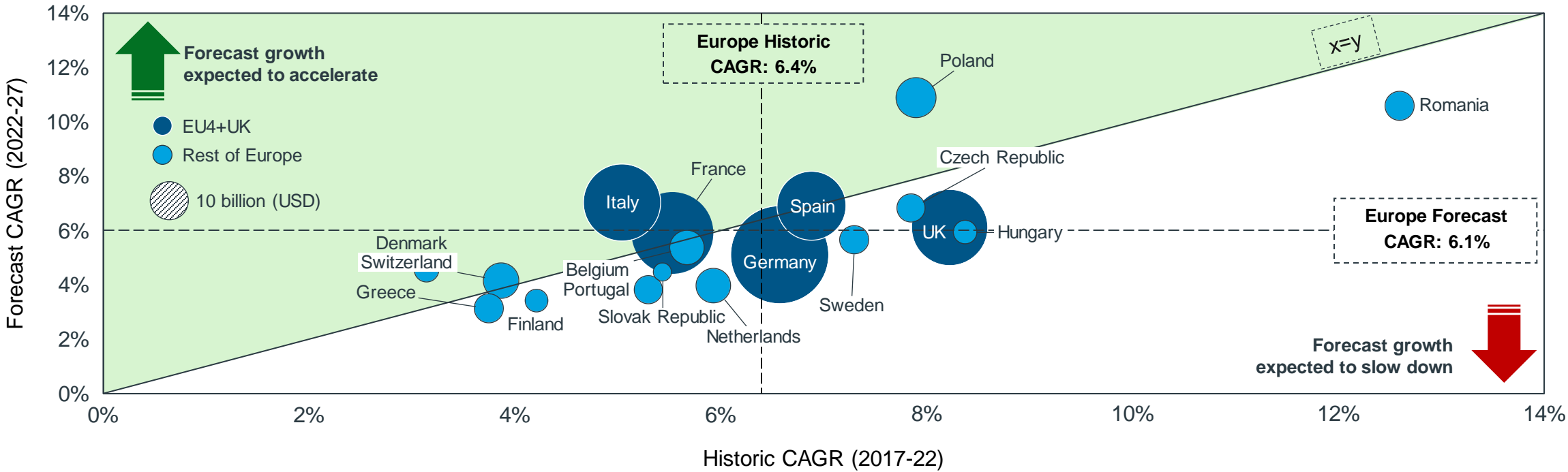
- **The US will post a CAGR of 7-8%** over 2022-2027. However, **several major patent expiries and subsequent generic/biosimilar competition** during the forecast period **will weigh strongly on growth**. **EU4 + UK** is forecast to **expand at a CAGR of 6-7%** from 2022-2027
- Governments of the developed markets are implementing multiple measures for **healthcare reforms to improve quality and efficiency to address the inequalities exposed by pandemic** and to **improve market access to the innovative drugs**

Notes: Bubble size indicates 2022 sales, Growth calculated using constant exchange rates; Contains Audited + Unaudited data, Total pharmerging includes China
 Source: IQVIA EMEA Thought Leadership, Market Prognosis Sep 2023

Among EU4+UK countries, France and Italy show improved market growth whereas Spain's growth remains stable in 2022-2027, exclusive of vaccines

Age-related diseases will rise with the growing 65+ aged population

Top 18 Europe growth (Historic vs. Forecast)

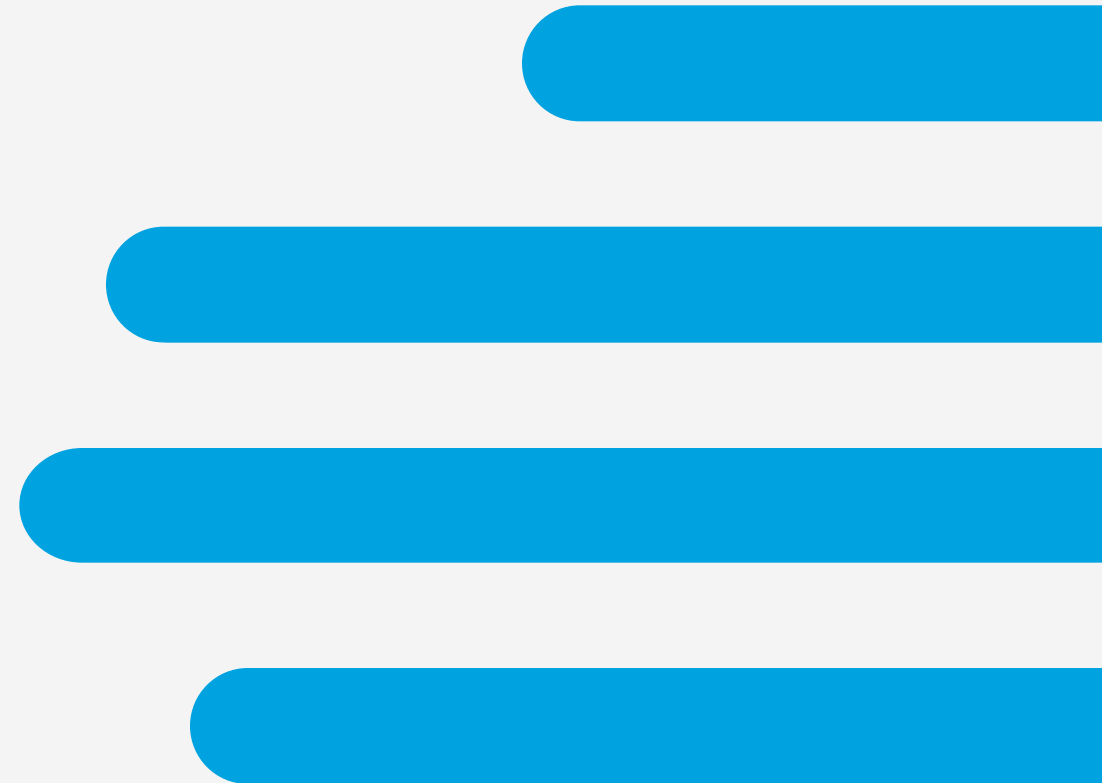


Along with new product launches and improved access to high-cost innovative drugs, the **growing aged (65+ cohort) population** is a contributing factor to expected market growth in EU countries, as **incidences of chronic, age-related diseases increase**

Multiple measures are taken by EU member states to improve market growth such as, **increasing national budgets for health (e.g., Italy, France, Spain), clearing the backlog and increased demands in healthcare post COVID-19 (e.g., Italy, Spain) etc. Restricted drug pricing, strict prescribing policies and limited budget are the key constraints in the market growth for EU4+UK countries**

Notes: Bubble size indicates 2022 sales, Growth calculated using constant exchange rates; Rebates and discounts are not considered; Contains Audited + Unaudited data; Europe CAGR excludes Ukraine and Turkey
 Source: IQVIA EMEA Thought Leadership; Market Prognosis Sep 2023

Biosimilar Market Trends 2023-2032



Despite the growing LoE opportunities, biosimilar competitions in Europe remain yet to be unlocked to their full potential

Limited market size, rapid innovations of new products are key challenges for biosimilar competitions

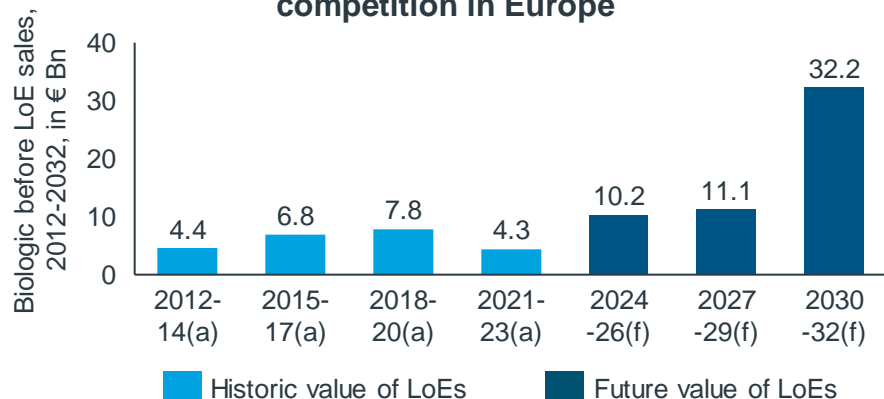
European biosimilar market and share by therapy area

	Biosimilar market size (2021)	Biosimilar share in terms of DoT (2021)
Immunology	€4.3 Bn	65%
Oncology	€2.8 Bn	71%
Endocrinology	€0.6 Bn	57%
Other TAs	€2.2 Bn	33%



- Biosimilar medicines have reached **€9.7 billion in 2021 across European markets**
- The European market has a strong impact of biosimilars as the **realized savings due to biosimilar competition is more than €30 billion across Europe by the end of 2022**
- Biosimilars provide **potentially earlier and broader market access to the necessary medicines, savings from reduced cost, increased sustainable innovation and competitive pressure on the reference biologics**

Opportunity forecast for biosimilar competition in Europe



- Total **110 biological medicines are anticipated to lose intellectual property** by the end of 2032 in Europe
- **The emerging LoE opportunities are expected to peak at €32.2 billion (2030-2032)**, which is **8-fold increase** in the value compared to 2012-2014
- Reference medicines **failed to attract biosimilar competitions** due to multiple challenges such as **limited market size, rapid innovation of new products** etc.

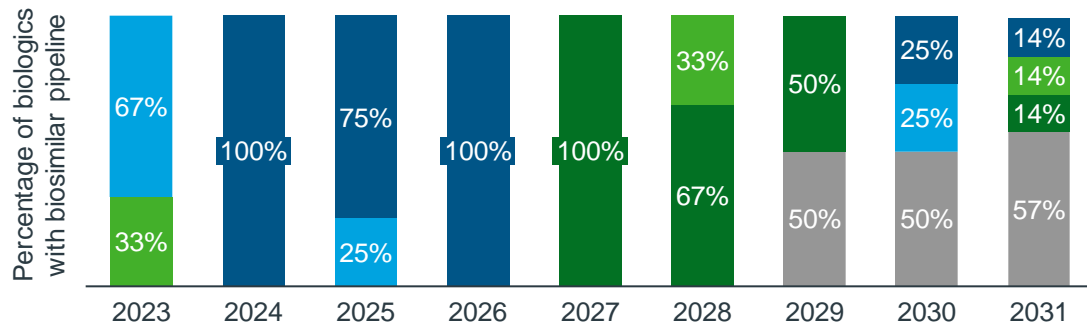
Note: (a) represents actual sales and (f) represents forecast sales; Abbreviation: DoT- days of treatment, TA- therapeutic area, LoE- loss of exclusivity

Source: 1. [Unlocking Biosimilar Potential 2023](#); 2. [Assessing the Biosimilar Void 2023](#)

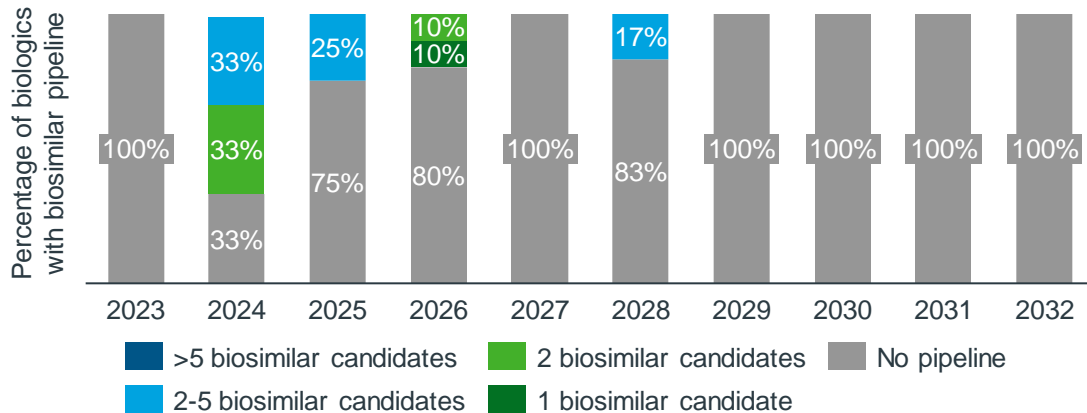
The number of biosimilar pipeline candidates may vary for high-sales biologics, whereas low-sales biologics see limited developments

The biologics market is not expected to see intense biosimilar competition in the next ~7-8 years

Percentage of high-sales biologics with biosimilar pipeline by LoE date*



Percentage of low-sales biologics with biosimilar pipeline by LoE date*



*Note: High sales- biologics with > €500 Mn in European annual sales before LoE; Low sales- biologics with < €500 Mn in European annual sales before LoE

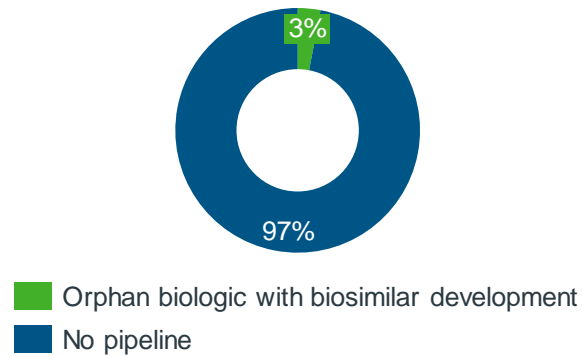
Abbreviations: LoE- loss of exclusivity; Source: 1. [Unlocking Biosimilar Potential 2023](#); 2. [Assessing the Biosimilar Void 2023](#) 3. [The Impact of Biosimilar Competition in Europe 2022](#)

- **55% of all biologics facing LoEs in between 2022-2027 do not have a biosimilar in clinical development**
- The majority of biologic LoEs in the next 10 years will be in
 - **Oncology-biologics: 24%**
 - **Immune-system treating biologics: 11%**
 - **Blood disorders: 10%**
- Biosimilar development programs are concentrated on therapeutic areas such as
 - **Oncology**
 - **Immunology**
 - **Ophthalmology**
- For low-sales biologics, limited commercial opportunity leads to low level of biosimilar development, leading to missed opportunity of €7 billion in this segment
- Commercial value of the reference biologics, **regulatory obstacles, therapeutic classes and disease indications** are the determining factors for biosimilar development and launch

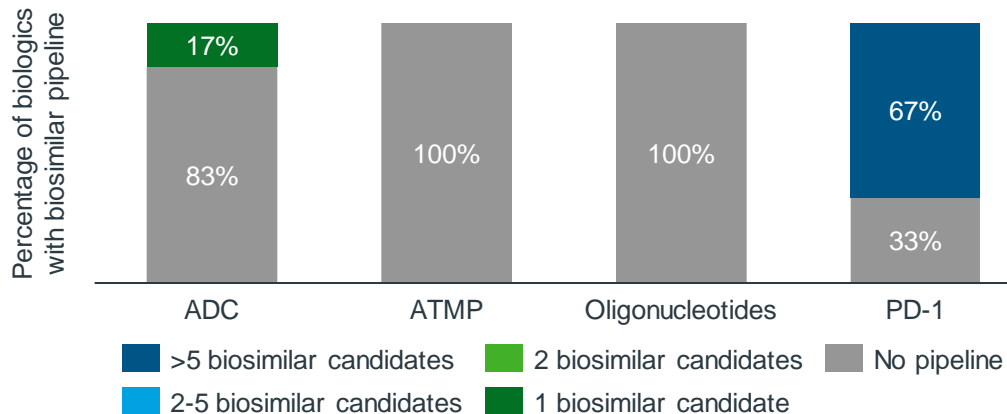
Smaller market size, complex biologic structures and unique logistic requirements are other factors impacting biosimilar development

Orphan and complex biologics have very limited biosimilar attraction

Pipeline availability of orphan biologics (2023-2032)



Percentage of complex biologics with biosimilar pipeline (2023-2032)



Abbreviations: LoE- loss of exclusivity; ATMP- advanced therapy medicinal products

Source: 1. [Assessing the Biosimilar Void 2023](#)

- **39 orphan biologics are facing LoE by 2032**
- Biosimilar development is in pipeline for only one orphan biologic eculizumab
- Biosimilar medicine development for orphan biologics is uncertain due to:
 - **Smaller market size**
 - **Less commercial opportunity**
 - **Variable uptake** among different EU member states
- Other factors that limit biosimilar development are
 - Complex structures of biologics
 - Unique logistic requirements of complex biologics
- The complex biologics include:
 - **Antibody-drug conjugates (ADCs)**
 - **Cell and gene therapies (ATMPs)**
 - **Oligonucleotides and PD-1 inhibitors**
- **Differences in reimbursement policies and incentives among member states in Europe create significant challenges for biosimilar developers, especially for orphan biosimilars**

Increased awareness and experience about biosimilars are changing physicians' perceptions about biosimilar usage in patient management

The biosimilars are steadily getting accepted in the healthcare system



Physicians' perceptions on biosimilar use

- Physicians' concerns regarding biosimilars have reduced with gaining experience on biosimilar usage. Nearly 63% of physicians' perception about biosimilars have evolved over time and become more positive
- Physicians also reported the number of biosimilar-treated patients being increased 15-20% after one year of biosimilar entry in the market
- The key factors considered by physicians while prescribing biosimilars include **lower costs, hospital and payer incentives, and gaining self-experience**
- The major concerns for not prescribing biosimilars include **efficacy, safety, bio-compatibility, adverse events, and route of administration**



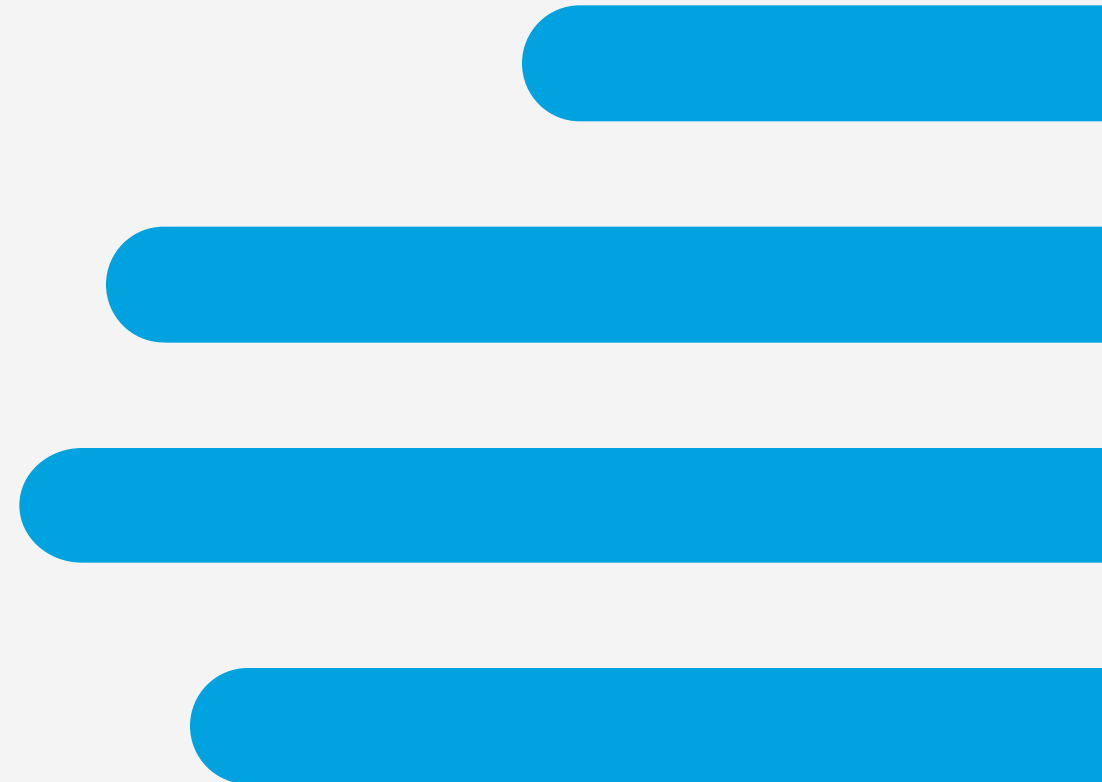
Drivers for adoption of biosimilars among physicians

- Biosimilar awareness and gained experience among physicians is improving their perception about biosimilar use. This scenario implicates that **biosimilars are steadily getting recognized in healthcare and in the process of patient management**
- Increased acceptance of biosimilars can decrease the financial burden and the savings can be utilized for better access of biologics to the patients

Abbreviations: LoE- loss of exclusivity

Source: 1. [Unlocking Biosimilar Potential 2023](#)

Evolving Landscape of Vaccine Market



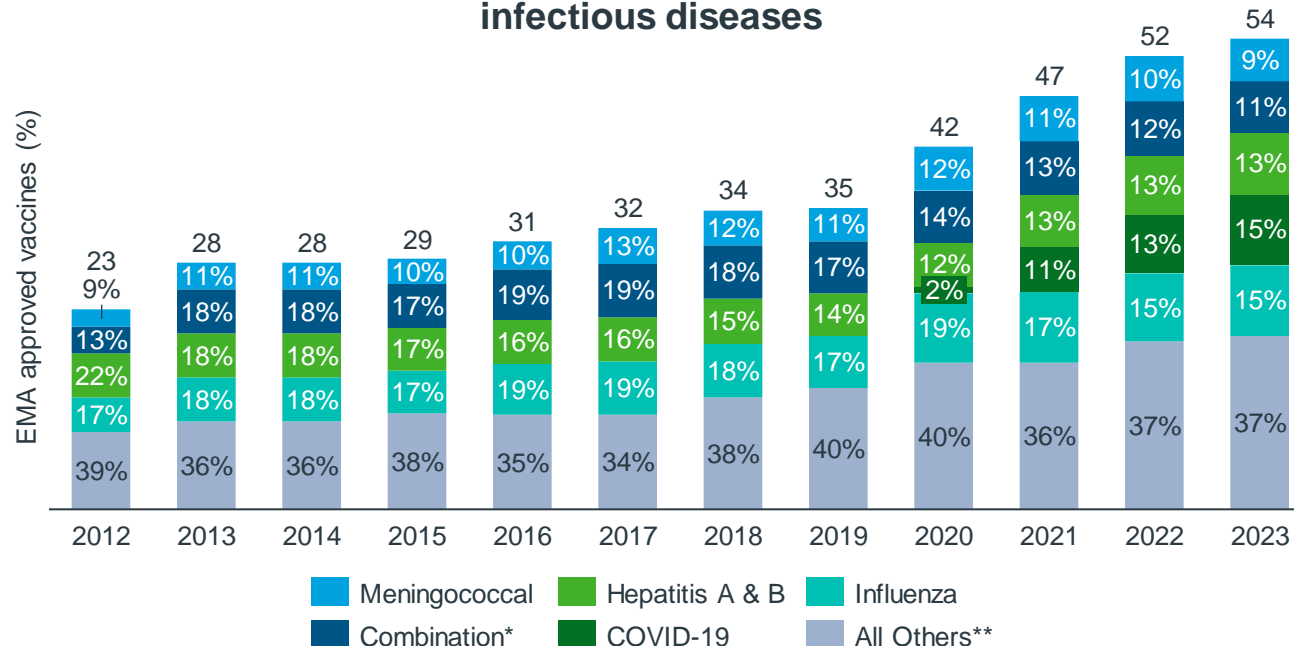
In 2023, total 54 vaccines are approved in EMA for over 20 infectious diseases

There is a global need for vaccine development for vaccine preventable diseases



- **Vaccines save an estimated 4-5 million lives per year** by offering the most effective public health intervention to the individuals of all ages
- For every €1 spent on adult vaccination, €4 is the estimated saving from future health-related cost. For example, seasonal flu vaccines in Europe save €248-332 million annually, by avoiding hospital and GP visits

EMA approved vaccines against infectious diseases



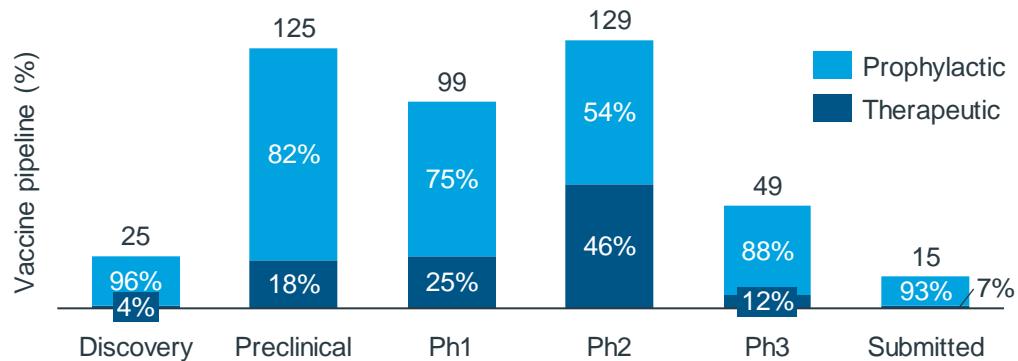
- 54 vaccines are approved in the EMA, providing protection against more than 20 infectious diseases. Although recent approvals are mostly focused against COVID-19, other indications also see new innovations (e.g., **first vaccine against RSV has been approved in EMA in 2023**)
- Before COVID-19 pandemic, 77% of the EU countries spent <0.5% of their healthcare budgets on vaccination programs, despite the economic and public health benefits of vaccines
- There is an increased need for vaccine development and innovation, as **the known viruses for VPDs are evolving** (e.g., Polio virus)
- Challenges in vaccine development creates **an unmet need for diseases** such as HIV, neglected tropical diseases (NTDs)
- **Vaccination drives at a wider level might be hindered** due to vaccine unavailability, antimicrobial resistance, inconsistency in vaccine access, vaccine hesitancy among individuals and inadequate funding

Note: *Combination includes Diphtheria/Tetanus/Pertussis, Polio, Chickenpox, Measles/Mumps/Rubella, Haemophilus influenzae B, Hepatitis B; **All Others include RSV, HPV, Dengue Fever, Shingles, Rotavirus, Pneumococcal, Ebola, Smallpox/Monkeypox; Abbreviations: Mn- million; EMA- European Medicines Agency; RSV- respiratory syncytial virus; VPD- vaccine preventable diseases; HIV- human immunodeficiency virus
 Source: [Race for Immunity: Exploring the Evolving Landscape of the Vaccines Market](#)

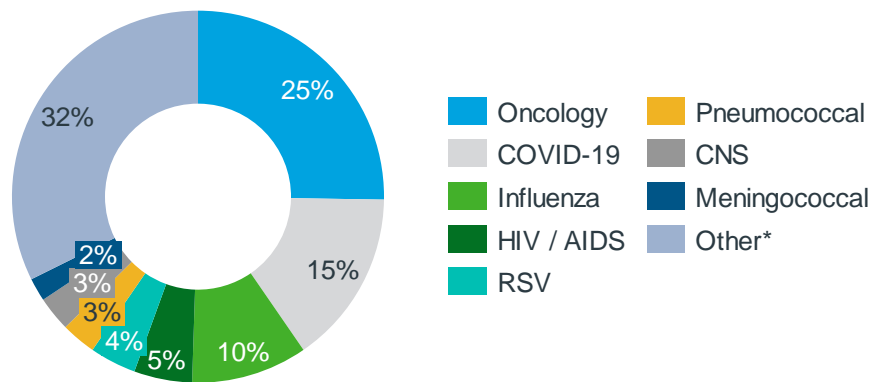
Prophylactic vaccines are effective against primary infections and subsequently prevents antimicrobial resistance

Majority of global vaccine R&D pipelines have prophylactic vaccines in development

Global vaccine R&D pipeline – All assets in active trials (n=442)



Global vaccine R&D pipeline – All assets by indications (n=277)



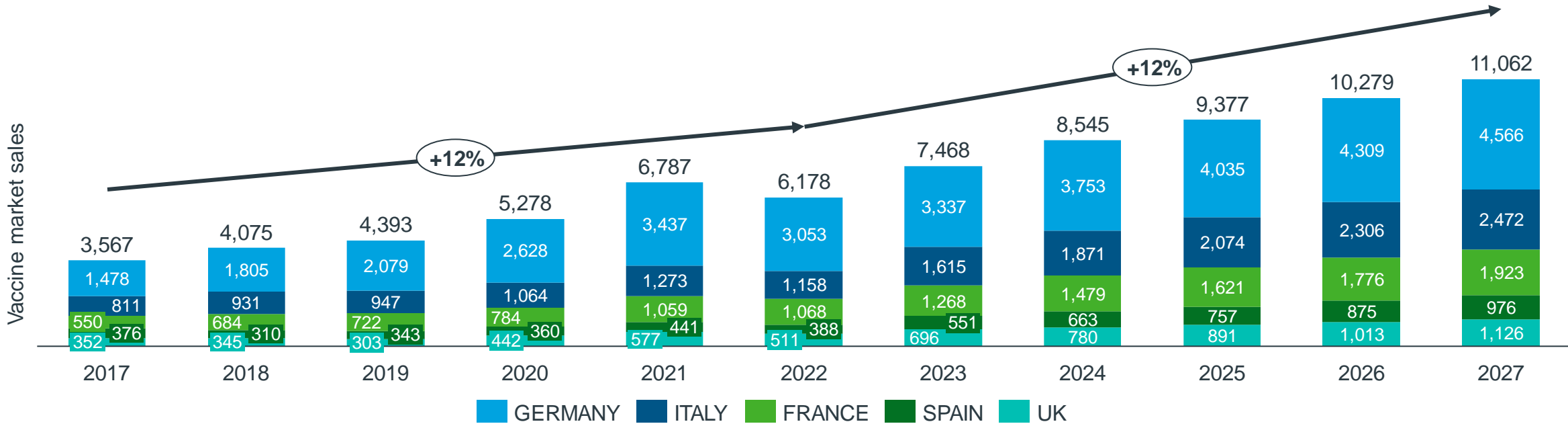
- Global vaccine clinical trials expanded by 14% between 2017-2022
- R&D pipeline is split between prophylactic and therapeutic vaccines in a 2:1 ratio, suggesting major development focus on prophylactic vaccines
- **Therapeutic vaccines are mostly focused on oncology** and are developed based on mRNA technology. Aside from COVID-19, another prominent area of vaccine development is influenza
- **Prophylactic vaccines provide protection against primary bacterial and viral infections and prevent the use of antibiotics**, thus reducing the chance of developing antimicrobial resistance
- Due to COVID-19 pandemic, vaccine development programs have been interrupted for other indications such as dengue, leishmaniasis, scabies and chikungunya
- Current strategies of global vaccine R&D pipelines are being developed to address the global threats of antimicrobial resistance, NTDs, and are focused on WHO's Priority Pathogen list

Note: *Other includes Chikungunya, Malaria, Tuberculosis, Zika, Dengue, CMV, Hepatitis B; Abbreviations: CNS- Central nervous system diseases; RSV- respiratory syncytial virus; HIV- human immunodeficiency virus; CMV- cytomegalovirus; NTDs- neglected tropical diseases; Source: [Race for Immunity: Exploring the Evolving Landscape of the Vaccines Market](#)

EU4+UK vaccine market has overall consistent historic and forecast growth, where Germany is contributing the highest vaccine sales in the market

EU4+UK vaccine market excluding COVID-19 vaccine is expected to grow at 12% CAGR between 2022- 2027

EU4+UK vaccine market sales exclusive of COVID-19 (\$ Mn)



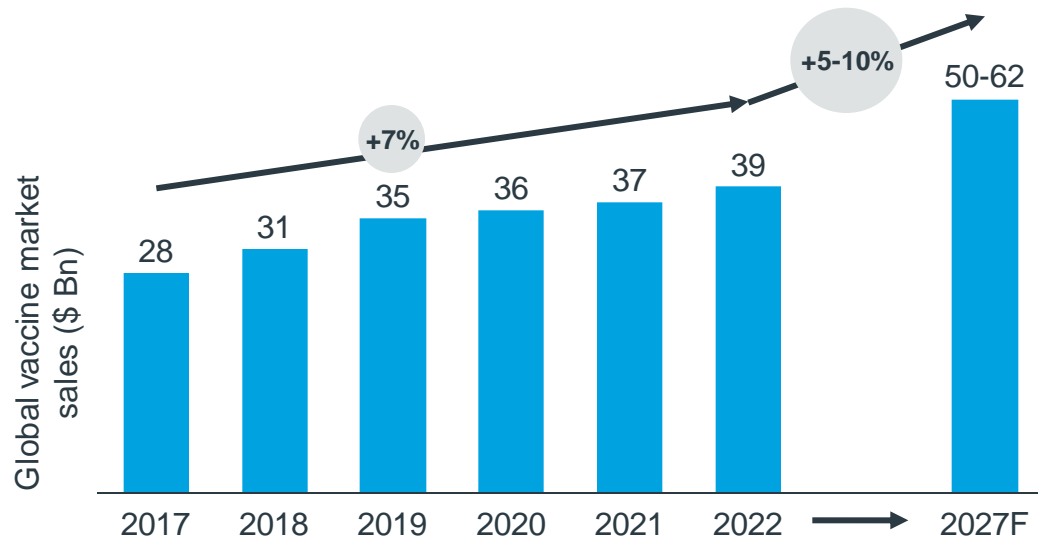
- Total vaccine sales in EU4+UK in 2023 is \$7,468 million and is expected to reach to \$11,062 million in 2027. The historic CAGR between 2017-2022 and the future CAGR between 2022-2027 remain the same, which is 12%
- In a country-wise scenario, Spain and UK have the highest CAGR between 2022-2027, which are 20% and 17% respectively

Abbreviations: Mn- million; CAGR- compound annual growth rate; Source: IQVIA Analytics link

The vaccine markets for influenza, HPV, shingles and RSV vaccines are expected to grow in the next 5 years

Future global vaccine market is expected to grow at 5-10% CAGR until 2027

Global vaccine market sales exclusive of COVID-19 (\$ Bn)



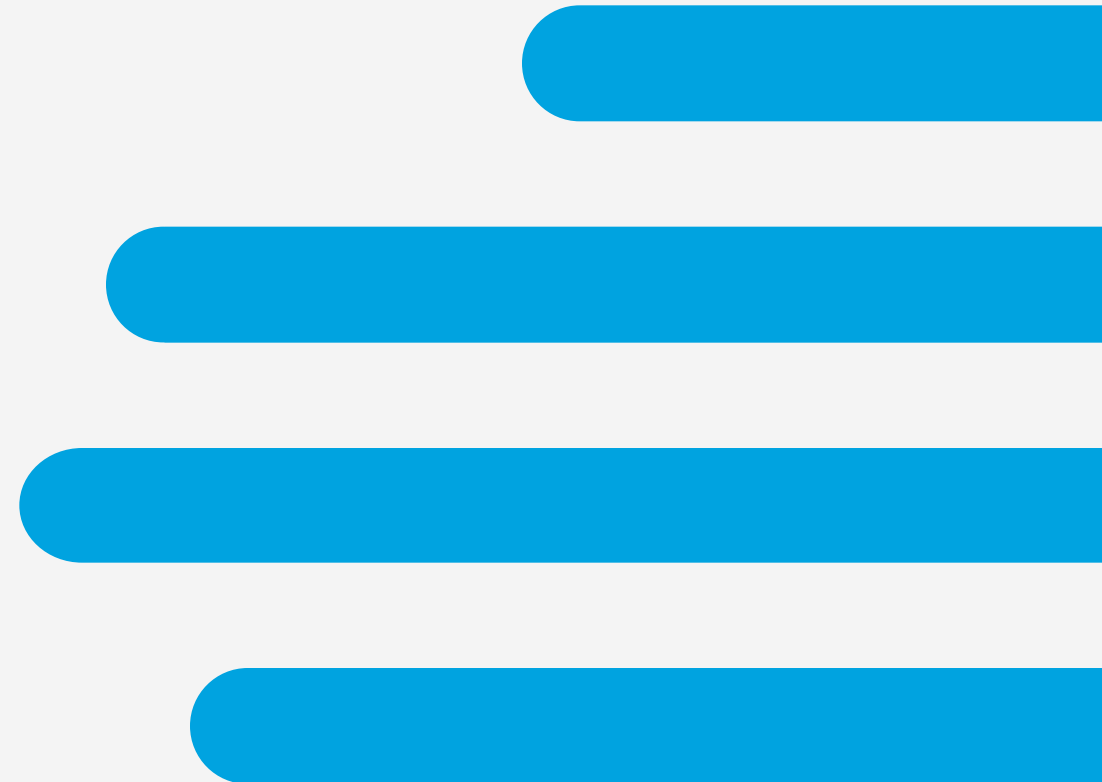
- **Global vaccine market has reached \$39 billion in 2022** with a CAGR of 7% between 2017-2022, excluding COVID-19 vaccines. **The future market is expected to grow with a CAGR of 5-10% in the next 5 years (till 2027) and to reach \$50-62 billion**
- According to WHO global vaccine market report (2022), **5.3 billion doses of vaccines were supplied by the vaccine market in 2021** excluding COVID-19 vaccines
- As a result of market expansion due to vaccination campaigns, **HPV and shingles market is expected to grow** at 10% 5-year CAGR until 2027. Seasonal respiratory infections are anticipated to surge in the next 5 years, increasing expectancy of **influenza vaccines to grow** ~5%
- Market for newly approved **RSV vaccines in 2023 is expected to reach \$4.5-\$7.5 billion by 2027**



- Vaccine intervention is an essential element in public healthcare, especially after the COVID-19 pandemic. Issues such as aging population, climate change, vaccine hesitancy, antimicrobial resistance, health system disparities are required to be addressed to establish efficient functioning of routine vaccination programs as well as future pandemic situations
- Key enablers to gain foothold in vaccine market include: government engagement in vaccination programs as a public health priority, designing a go-to-market model, safe and cost-effective value proposition for vaccines, easy access to vaccines and awareness initiatives can be taken

Abbreviations: Bn- billion; CAGR- compound annual growth rate; Source: [Race for Immunity: Exploring the Evolving Landscape of the Vaccines Market](#)

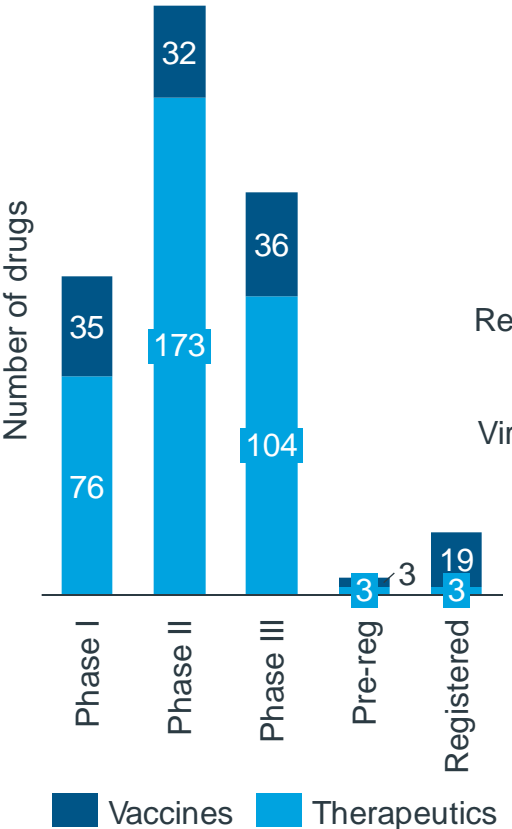
Updates on COVID-19 Pipeline



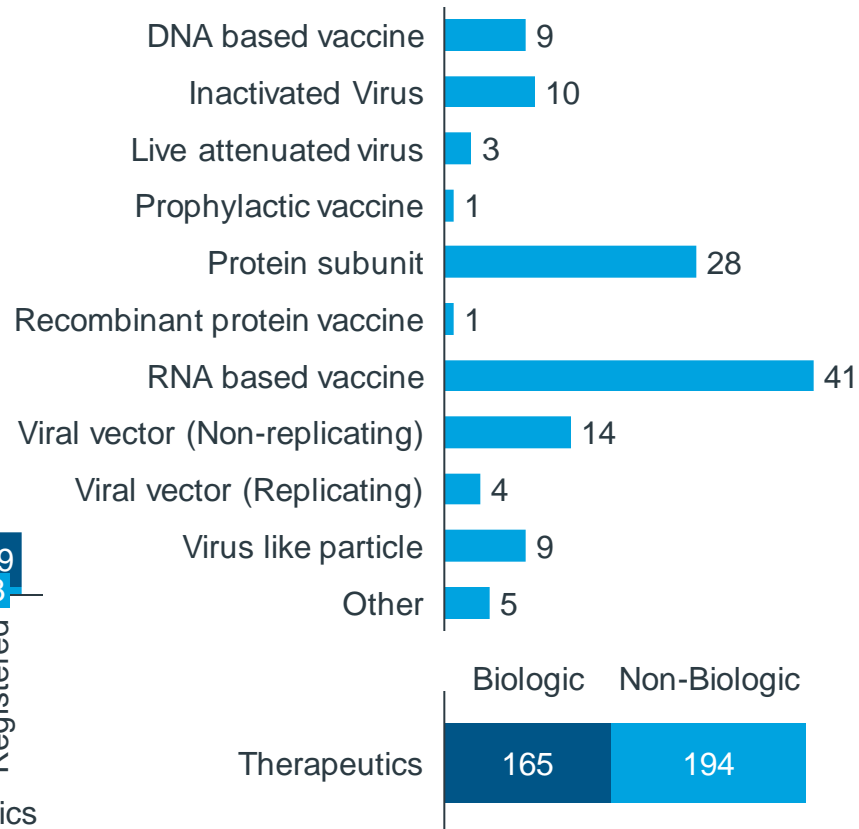
Current COVID-19 pipeline is dominated by therapeutics; EU4 & UK-based companies account for ~14% of total drugs under development

As more drugs are developed, the clinical trials for therapeutics are concentrated in early phases

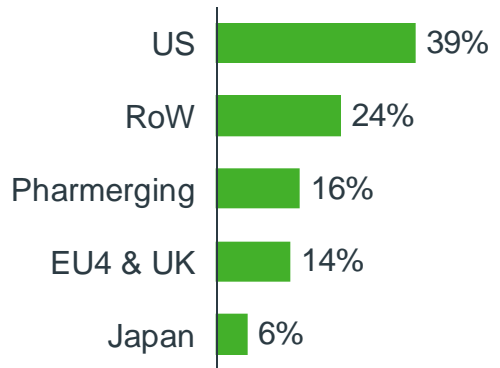
Number of drugs by phase



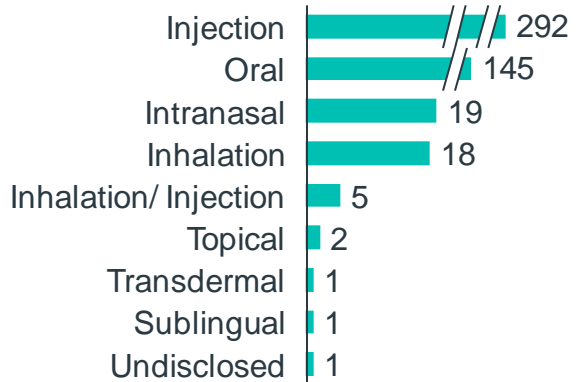
Number of drugs by type of platform/class



Drug records (%) by corporation nationality*



Number of drugs by formulation



- Therapeutics dominate the COVID-19 pipeline, especially the early-stage pipeline
- EU4 & UK contribute ~14% of therapies under development by corporation nationality
- The most prevalent COVID-19 therapy formulations in development are injectables and oral medications

Note: Data is excluded for vaccine candidates which are pre-clinical or terminated in development. *Corporation Nationality: Nationality of a corporation with a specific licensing relationship in a region or therapy franchise
 Source: IQVIA Pipeline Intelligence. Data exported on 06/11/2023

COVID-19 vaccination – Recent news updates

Vaccine manufacturers and regulatory authorities are focusing on monovalent mRNA vaccines for protection against currently circulating variants

- The US FDA has approved and authorized updated COVID-19 vaccines (2023-2024 formula) for emergency use. These vaccines, manufactured by Moderna and Pfizer, include a monovalent (single) component against the omicron vaccine XBB.1.5 of SARS-CoV-2 (Sep 2023).¹ The EC has also authorized BioNTech-Pfizer's Comirnaty XBB.1.5 adapted COVID-19 vaccine (Sep 2023)²
- Daiichi-Sankyo has reached an agreement with Japan's Ministry of Health, Labour and Welfare to get the supply of omicron XBB.1.5 adapted monovalent mRNA vaccine against COVID-19 which will be used in the current special temporary vaccination program against COVID-19 in Japan that started in Autumn (Nov 2023)³
- STIKO recommends further booster doses in autumn vaccination campaign in Germany. The booster is applicable to people ≥60 years, residents of long-term care facilities, anyone >6 months with an underlying condition, people with increased infection risk, family members or close contacts of people with limited immune response to COVID-19 vaccination (Sep 2023)⁴
- The COVID-19 vaccination campaign in France has brought forward by 15 days and started on Oct 2 due to current increase in cases and appearance of new omicron variant BA.2.86. France Ministry of Health has recommended the program for people at the most risk for COVID-19 such as people ≥65 years, people with comorbidities, pregnant women, immunocompromised people, residents of nursing home, and long-term care units (Sep 2023)^{5,6}



Vaccine updates for new variants



Further vaccine update globally

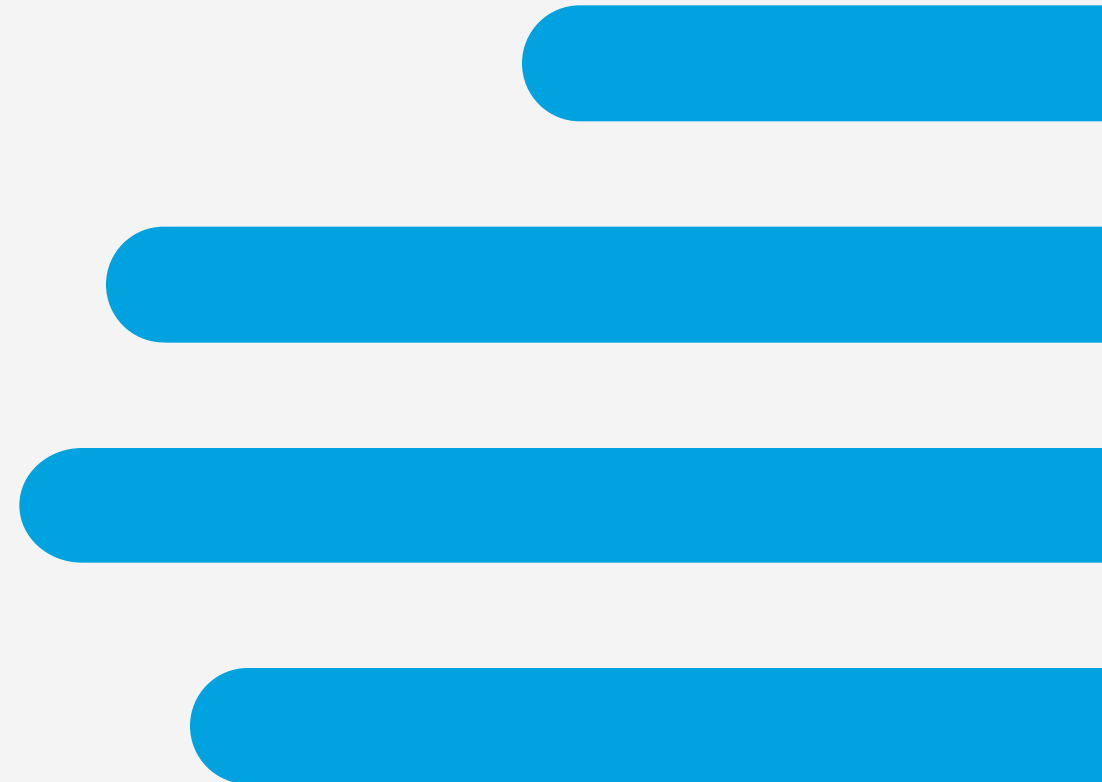
Research initiative on estimating the protective role of vaccine boosters against COVID-19

- A research study conducted in Albania by the Albanian Institute of Public Health, SECID, WHO Regional Office for Europe and US-CDC has demonstrated positive results that the COVID-19 vaccine booster provides considerable protection against COVID-19 infection in healthcare workers (Oct 2023)⁷

Abbreviations: SECID- the Southeast European Center for Surveillance and Control of Infectious Diseases; EC- European Commission; STIKO- the Standing Committee on Vaccination

Source: 1. [US-FDA news 2023](#); 2. [European Commission news 2023](#); 3. [Japan news 2023](#); 4. [STIKO Germany](#); 5. [France vaccination program](#); 6. [France COVID-19 variant](#); 7. [WHO news 2023](#)

Medicine Demand and Supply



Germany has registered volume growth across segments in YTD 2023 compared to YTD 2022



		Italy	Germany	Spain	France	UK
CH Market Units Growth	<i>YTD-2023 vs. 2022¹</i>	-6.2%	1.4%	-14.6%	-2.1%	-2.3%
	<i>Latest Month⁴</i>	-1.8%	-3.8%	1.1%	0.7%	-4.2%
Rx Retail Units Growth	<i>YTD-2023 vs. 2022³</i>	-2.8%	3.6%	2.4%	0.2%	4.6%
	<i>Latest Month⁴</i>	-2.5%	-1.6%	0.5%	-1.7%	2.2%
Rx Hospital Units Growth	<i>YTD-2023 vs. 2022³</i>	1.4%	2.2%	3.3%	6.5%	4.4%
	<i>Latest Month⁴</i>	-1.2%	-2.0%	0.2%	2.9%	-0.6%

Note: Retail pharmacy sales/Rx data has been used across countries. Any cross-country analysis needs to account for differences in healthcare systems.

¹IQVIA CH Customized Insights – Italy, Germany, Spain, France (Monthly sell-out data), UK (Monthly sell-in data); Only OTC segment coverage for UK

²IQVIA MIDAS data – Retail panel – Italy, Germany, Spain, France (Monthly sell-out data), UK (Monthly sell-in data)

³Monthly IQVIA MIDAS data – Hospital panel – Italy, Germany, Spain, France, UK

⁴Latest month – November 2023

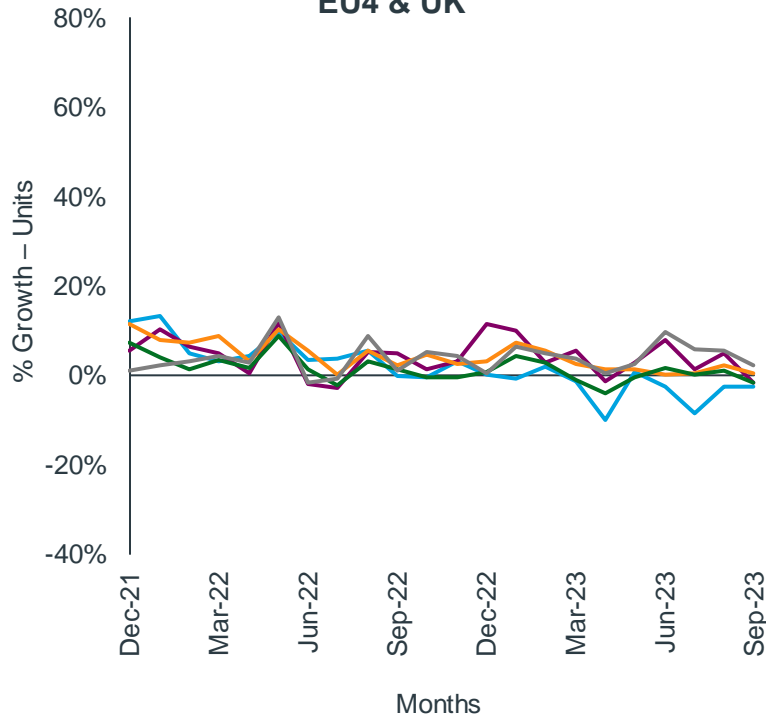


Spain and France market showed volume growth in Hospital and CH market in YTD 2023 compared to the same period in 2022

% Growth in Units – Rx Retail market, Hospital market, Consumer Health market

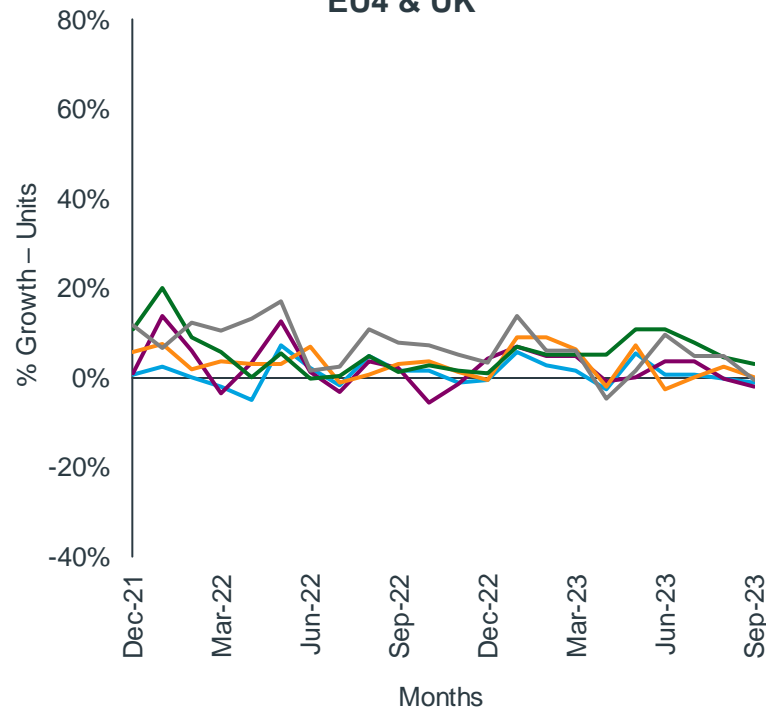
Retail Rx market

**% Growth – Units Current Year vs. Same Month Previous Year
EU4 & UK**



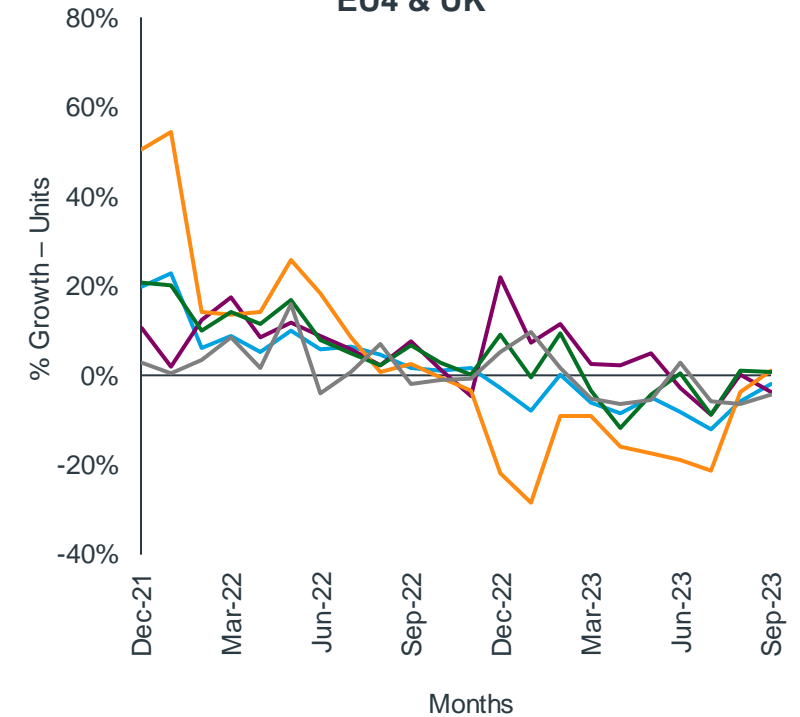
Hospital market

**% Growth – Units Current Year vs. Same Month Previous Year
EU4 & UK**



Consumer Health market

**% Growth – Units Current Year vs. Same Month Previous Year
EU4 & UK**

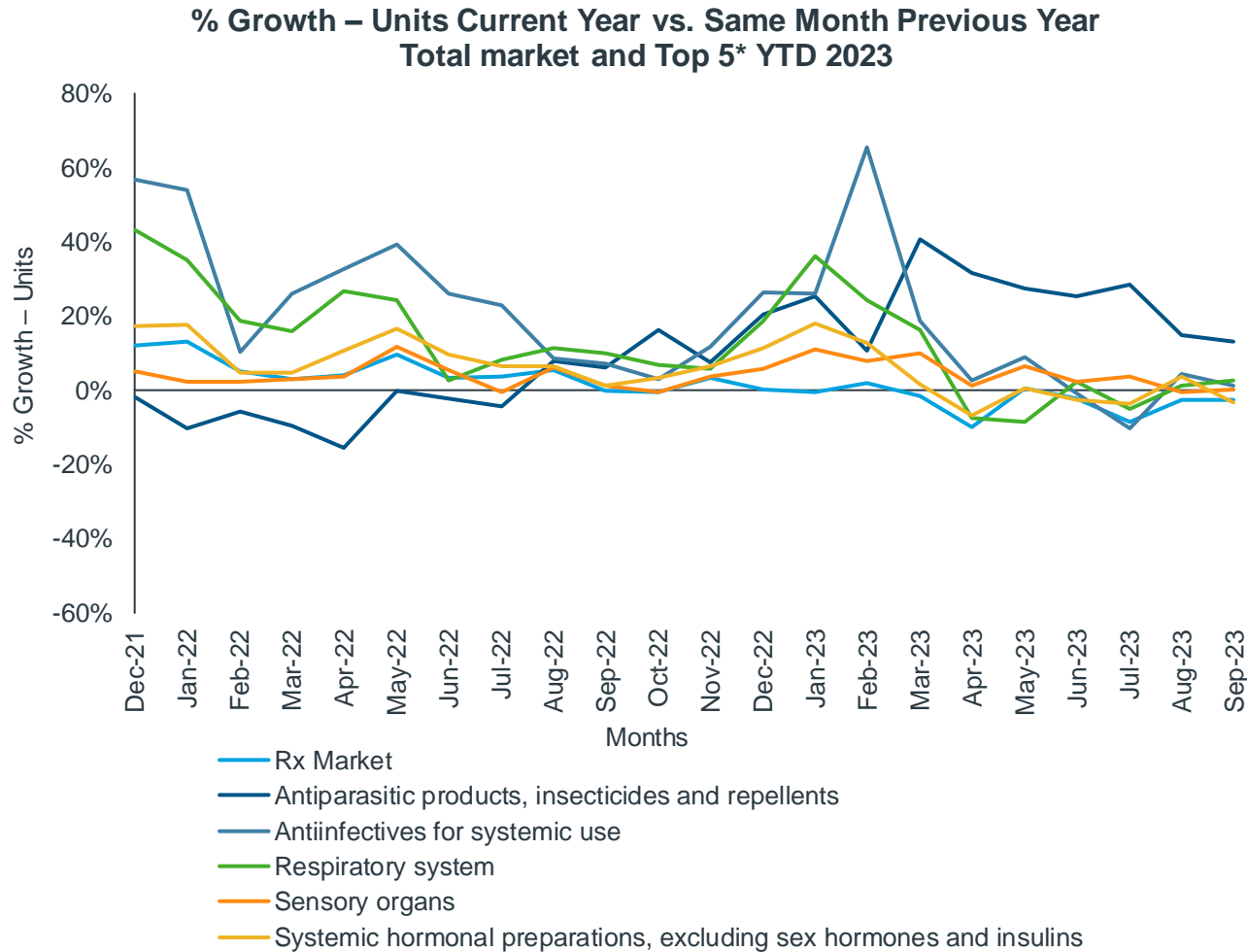


— Italy — Germany — Spain — France — UK

Source: IQVIA CH Customized Insights, IQVIA MIDAS data (Retail panel) – Italy, Germany, Spain, France (Monthly sell-out data), UK (Monthly sell-in data); Monthly IQVIA MIDAS data – Hospital panel; November 2023



Italy retail prescription volume sales declined by 2.8% in YTD 2023 versus the same period 2022



Top* 2 ATC3 classes within Top* 5 ATC1 classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Rx Market	-0.7%	-2.5%	-2.8%
Antiparasitic products, insecticides and repellents	25.3%	13.2%	23.8%
Anti-Malarials	75.0%	-30.0%	25.8%
Anthelmintics	25.0%	16.7%	20.2%
Anti-infectives for systemic use	26.0%	1.3%	12.0%
Cephalosporins & Combs	56.8%	-0.5%	23.8%
Broad Spectr. Penicillins	39.3%	15.0%	21.1%
Respiratory system	36.0%	2.5%	6.4%
Anticholinergics In Combination With B2-Agonists	50.8%	8.3%	26.0%
Corticoids	107.5%	0.5%	24.5%
Sensory organs	11.1%	0.3%	4.6%
Ophth A-Inflam+A-Infect	24.2%	4.0%	12.0%
Miotics+Antiglau.Preps.	2.2%	-1.6%	-0.1%
Systemic hormonal preparations, excluding sex hormones and insulins	17.9%	-3.4%	2.1%
Thyroid Preparations	6.2%	1.3%	2.4%
Plain Corticosteroids	27.4%	-8.0%	2.0%

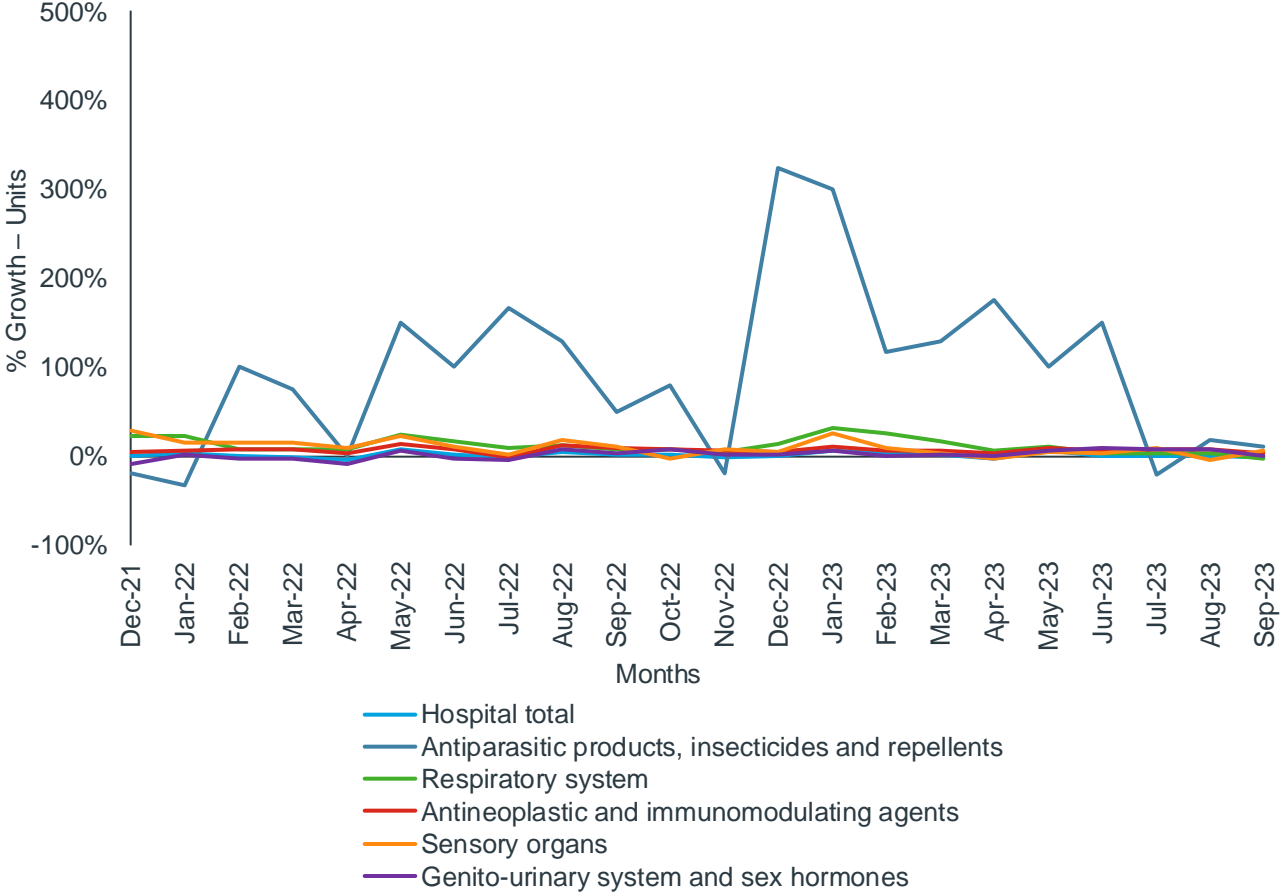
*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly sell-out data – November 2023 | Retail pharmacy panel – captures sales of Rx products only



Italy hospital market grew by 1.4% in YTD 2023 compared to 2022, driven by antiparasitic products, insecticides and repellents

**% Growth – Units in Current Year vs. Same Month Previous Year
Total hospital market and Top 5* YTD 2023**

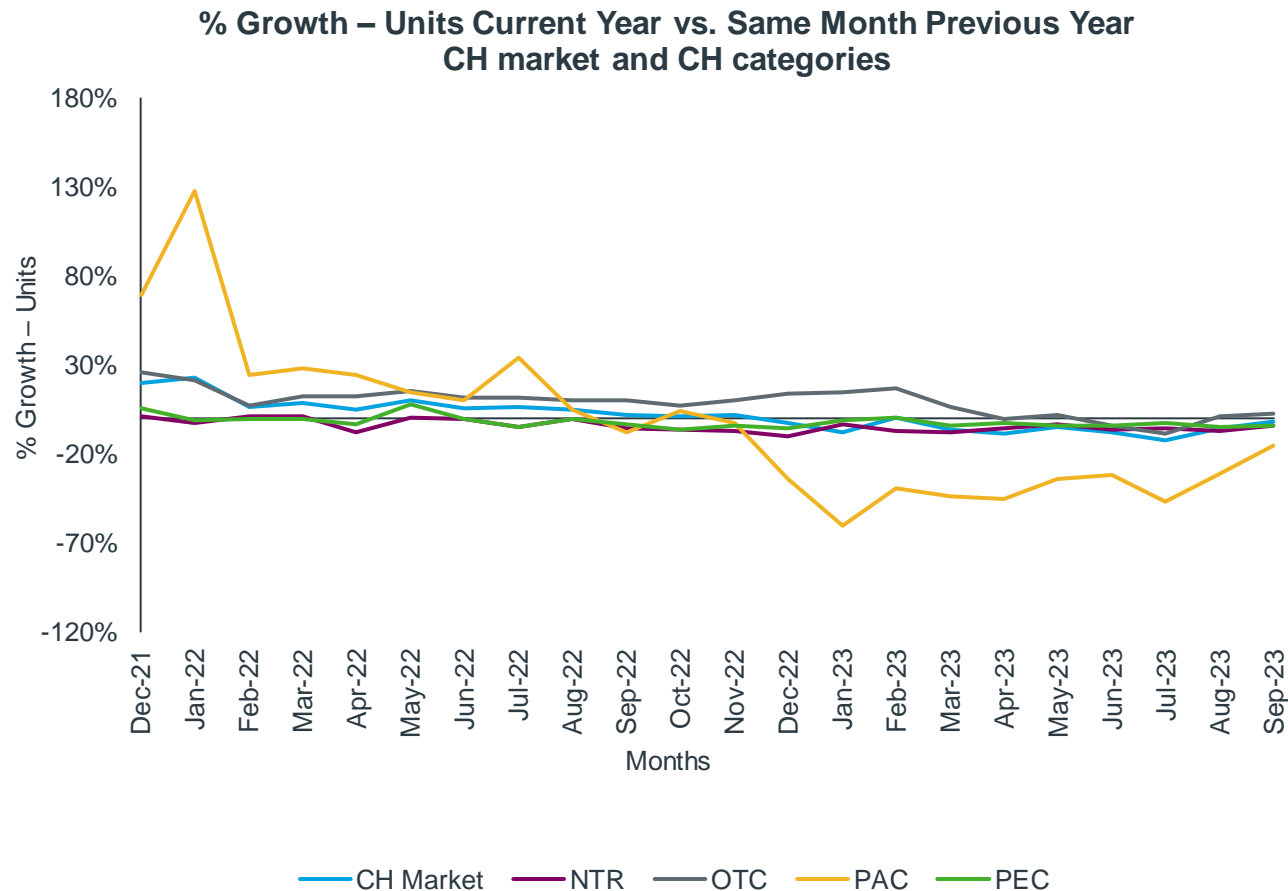


Top* 6 ATC Classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Hospital Market	5.6%	-1.2%	1.4%
Antiparasitic products, insecticides and repellents	300.0%	11.1%	60.2%
Respiratory system	31.9%	-2.2%	10.9%
Antineoplastic and immunomodulating agents	9.9%	2.4%	6.2%
Sensory organs	26.4%	5.5%	5.7%
Genito-urinary system and sex hormones	6.1%	0.5%	4.2%
Musculo-skeletal system	7.5%	-1.8%	3.3%

*Top in terms of YTD 2023 Growth
Source: IQVIA MIDAS monthly data – November 2023 | Hospital panel



Consumer health market in Italy declined by 6.2% in YTD 2023 compared to the same period last year



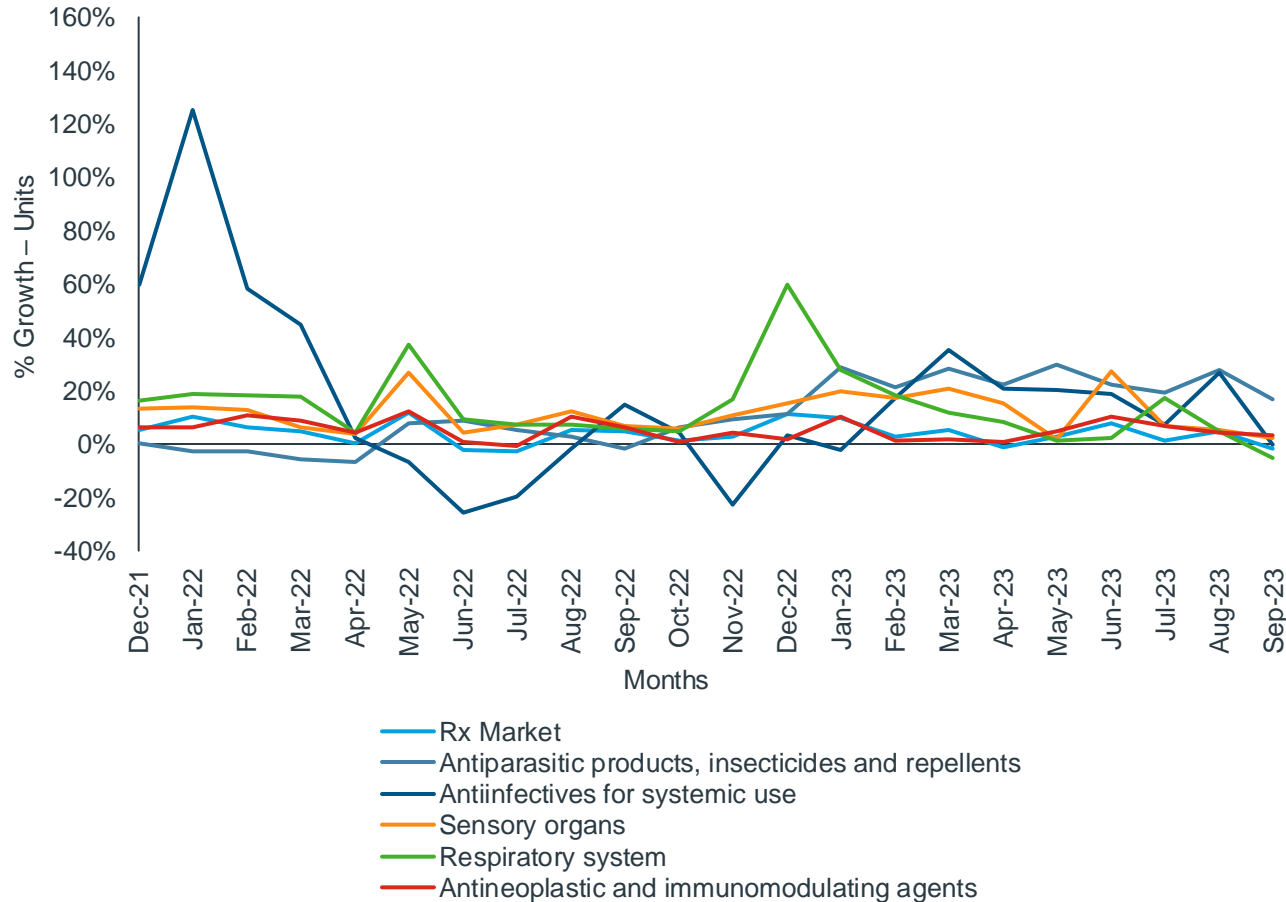
CH Categories and top* 2 classes within each category by Units Growth YTD 2023 vs. 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
CH Market	-8.0%	-1.8%	-6.2%
Nutrition (NTR)	-3.6%	-3.7%	-5.5%
Gluten-Free&Low Prot. Prds	-2.1%	-4.5%	-4.8%
Food For Adults	-4.7%	-5.7%	-7.2%
Over-the-Counter Drugs (OTC)	14.65%	2.6%	3.5%
Cough, Cold And Other Respiratory Products	31.3%	11.4%	12.9%
Digest & Oth Intest Prod	22.0%	0.6%	7.8%
Patient Care (PAC)	-60.1%	-15.1%	-41.5%
Incontinence Care Prds	6.6%	1.7%	3.0%
Prds For Bladder Problems	-0.8%	3.5%	0.6%
Personal Care (PEC)	-1.2%	-4.0%	-3.2%
Beauty Products For Women	13.3%	1.2%	4.3%
Unisex Beauty Products	11.4%	-12.5%	0.4%

*Top in terms of YTD 2023 Growth
Source: IQVIA CH Customized Insights monthly sell-out data – November 2023



The German retail market grew by 3.6% in YTD 2023 compared to YTD 2022, driven by antiparasitic and antiinfective products

**% Growth – Units Current Year vs. Same Month Previous Year
Total market and Top 5* YTD 2023**



Top* 2 ATC3 classes within Top* 5 ATC1 classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Rx Market	10.0%	-1.6%	3.6%
Antiparasitic products, insecticides and repellents	28.7%	16.7%	24.1%
Ectoparas.Incl Scabicide	26.9%	6.5%	23.8%
Anthelmintics	10.0%	13.5%	15.6%
Antiinfectives for systemic use	-2.1%	0.1%	14.4%
Bacterial Vaccines	38.9%	17.1%	21.7%
Polyval Immuno-Globl I.V	0.0%	0.0%	6.9%
Sensory organs	19.7%	2.6%	12.9%
Miotics+Antiglauco.Prods.	4.8%	-4.1%	1.8%
Ocular Antineovasc.Prods	-9.2%	3.4%	0.8%
Respiratory system	28.0%	-5.2%	9.4%
All Oth A-Asthma & Copd	14.3%	25.0%	22.4%
B2-Agonists	30.3%	-24.9%	18.4%
Antineoplastic and immunomodulating agents	10.5%	3.4%	4.8%
Interleukin Inhibitors	21.9%	13.9%	18.6%
Protein Kinase Inhibitor Antineoplastics	12.1%	8.2%	11.4%

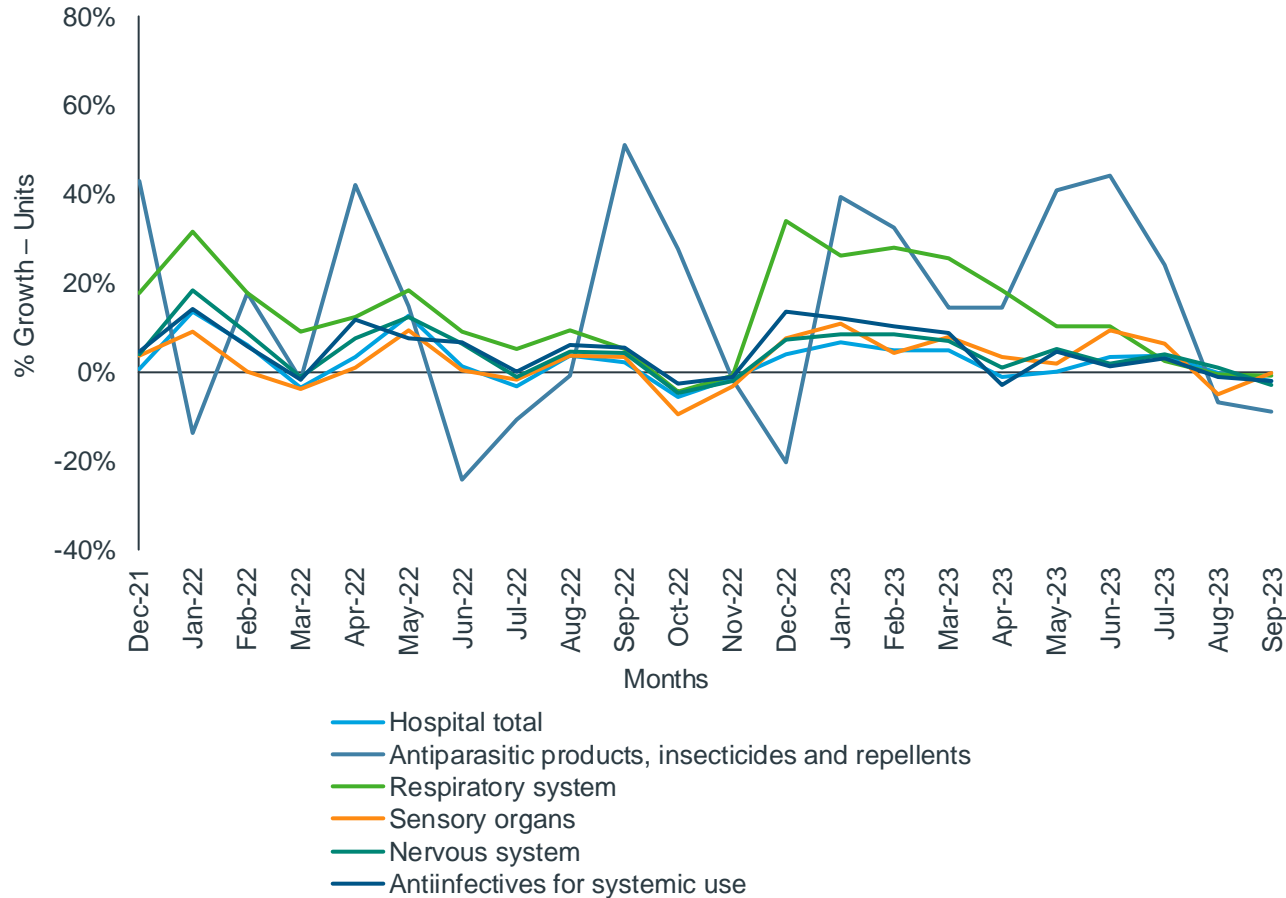
*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly sell-out data – November 2023 | Retail pharmacy panel – captures sales of Rx products only



German hospital market grew by 2.2% in YTD 2023 compared to the same period last year

**% Growth – Units in Current Year vs. Same Month Previous Year
Total hospital market and Top 5* YTD 2023**



Top* 6 ATC Classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Hospital Market	6.9%	-2.0%	2.2%
Antiparasitic products, insecticides and repellents	39.3%	-8.8%	19.4%
Respiratory system	26.1%	-0.7%	13.5%
Sensory organs	10.9%	-0.3%	4.4%
Nervous system	8.4%	-2.8%	3.8%
Antiinfectives for systemic use	12.2%	-2.0%	3.6%
Cardiovascular system	11.3%	-3.3%	3.5%

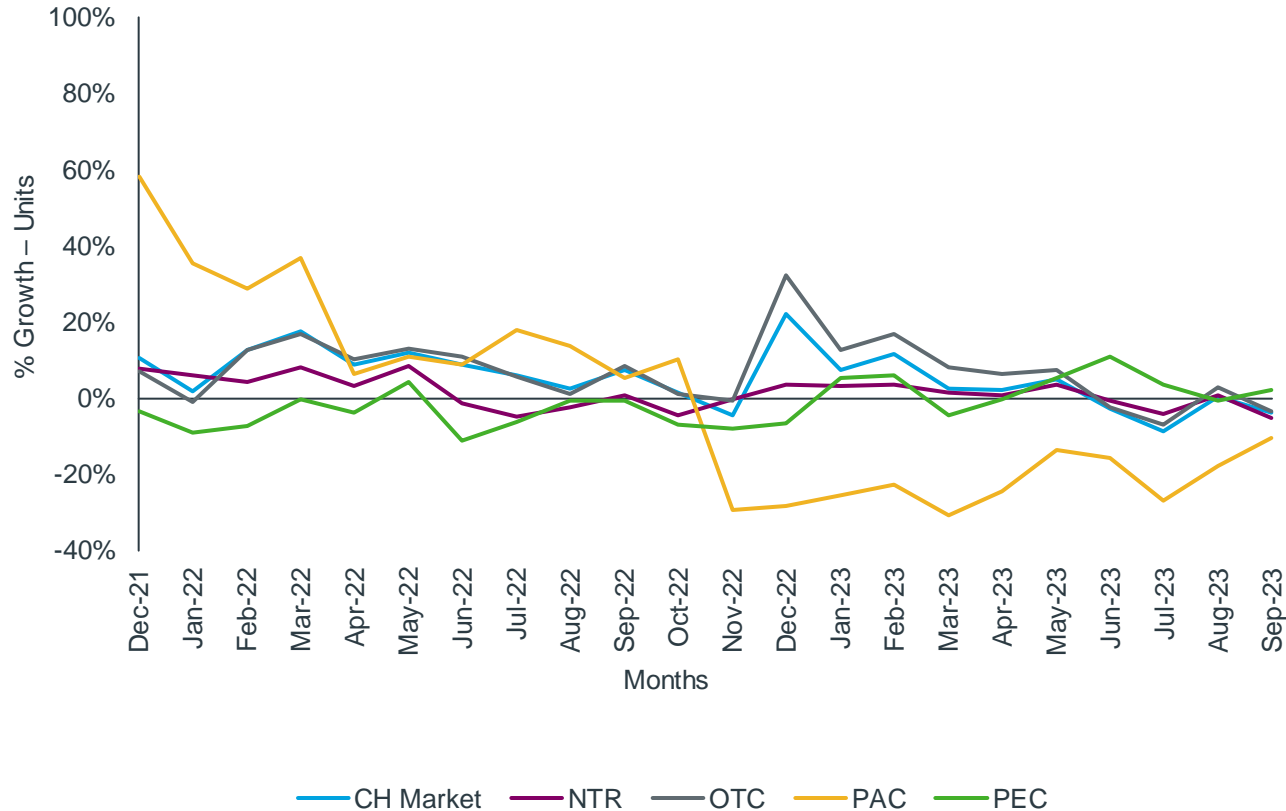
*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly data – November 2023 | Hospital panel



The German consumer health market grew by 1.4% in YTD 2023 vs. 2022, driven by OTC products

**% Growth – Units Current Year vs. Same Month Previous Year
Total market and Top 5* YTD 2023**



CH Categories and top* 2 classes within each category by Units Growth YTD 2023 vs. 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
CH Market	7.3%	-3.8%	1.4%
Nutrition (NTR)	3.2%	-5.4%	0.3%
Enteral Nutrition Products	28.6%	3.0%	10.4%
Baby Foods	-17.7%	-28.0%	-22.2%
Over-the-Counter Drugs (OTC)	12.51%	-3.4%	4.4%
Cough, Cold And Other Respiratory Products	30.2%	-9.1%	8.7%
Vitamins, Minerals And Nutritional Supplements, Tonics And Other Stimulants	6.5%	2.9%	6.1%
Patient Care (PAC)	-25.5%	-10.3%	-21.5%
Incontinence Care Prds	7.8%	7.3%	9.3%
Advanced Dressings	7.5%	-0.3%	1.0%
Personal Care (PEC)	5.4%	1.9%	2.9%
Unisex Beauty Products	8.9%	5.1%	4.1%
Beauty Products For Women	2.8%	-3.0%	1.4%

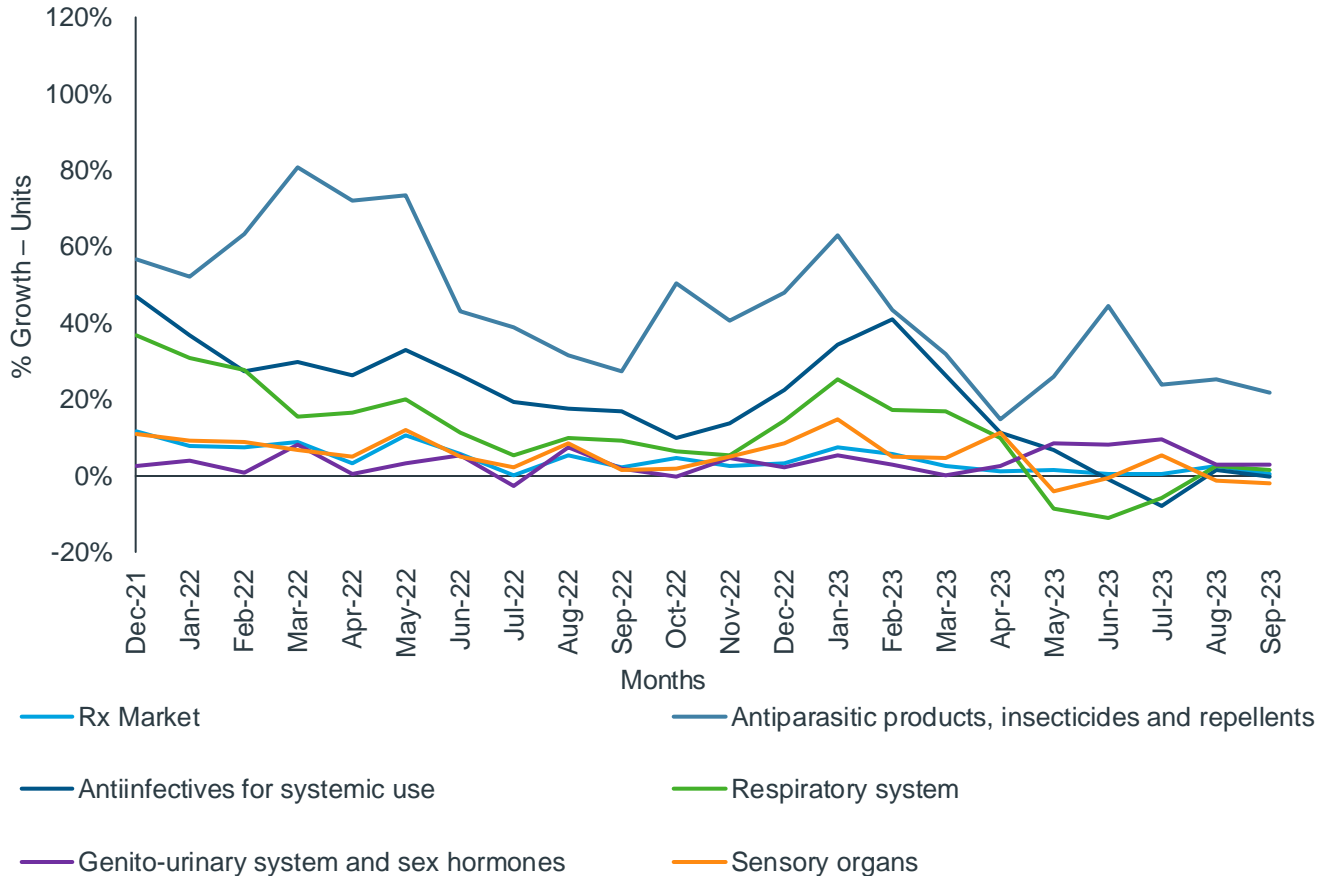
*Top in terms of YTD 2023 Growth

Source: IQVIA CH Customized Insights monthly sell-out data – November 2023



The Spanish retail market grew by 2.4% in YTD 2023 compared to the same period in 2022, driven by antiparasitic products

**% Growth – Units Current Year vs. Same Month Previous Year
Total market and Top 5* YTD 2023**



Top* 2 ATC3 classes within Top* 5 ATC1 classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Rx Market	7.3%	0.5%	2.4%
Antiparasitic products, insecticides and repellents	63.0%	21.9%	32.6%
Anti-Malarials	100.0%	23.5%	35.1%
Anthelmintics	58.4%	22.5%	34.6%
Antiinfectives for systemic use	34.4%	-0.2%	11.7%
Broad Spectr. Penicillins	44.2%	2.0%	17.3%
Cephalosporins & Combs	40.2%	3.5%	16.6%
Respiratory system	25.2%	1.3%	5.4%
Anticholinergics In Combination With B2-Agonists	23.4%	15.7%	19.0%
Antihistamines Systemic	29.9%	4.6%	8.2%
Genito-urinary system and sex hormones	5.4%	2.9%	4.8%
Urinary Incontinence Prd	7.5%	8.9%	7.6%
Erectile Dysfunction Prd	6.2%	14.5%	6.0%
Sensory organs	14.7%	-1.9%	3.3%
Anti-Infectives-Eye	34.1%	-6.5%	6.3%
Ocul.A-Aller.Decon.A-Sep	3.1%	8.2%	4.2%

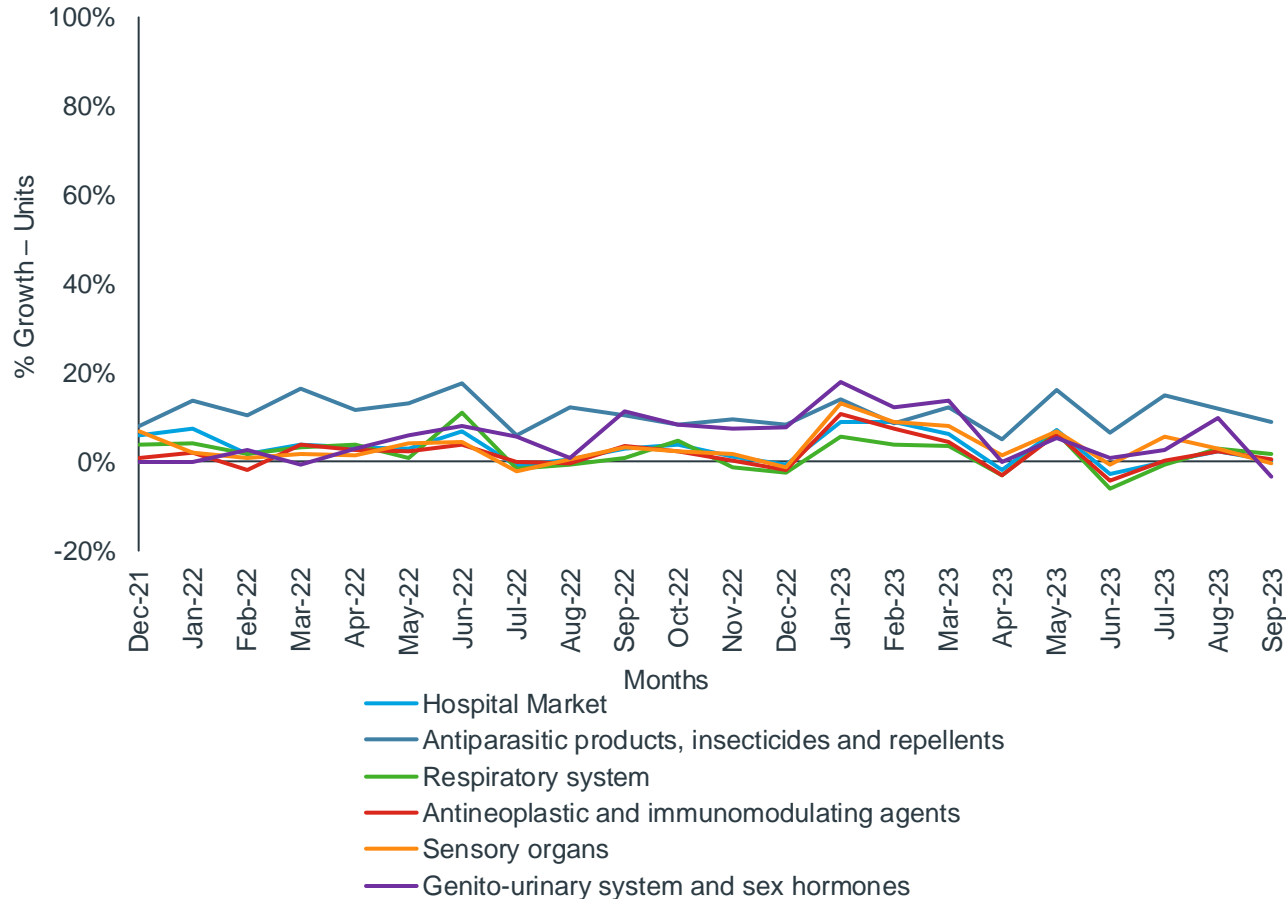
*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly sell-out data – November 2023 | Retail pharmacy panel – captures sales of Rx products only



Spanish hospital market grew by 3.3% in YTD 2023 compared to the same period last year, driven by antiparasitic and respiratory products

**% Growth – Units in Current Year vs. Same Month Previous Year
Total hospital market and Top 5* YTD 2023**



Top* 6 ATC Classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Hospital Market	9.0%	0.2%	3.3%
Antiparasitic products, insecticides and repellents	50.0%	88.9%	61.2%
Respiratory system	42.9%	11.6%	20.4%
Antineoplastic and immunomodulating agents	14.1%	8.8%	10.9%
Sensory organs	26.4%	3.6%	7.3%
Genito-urinary system and sex hormones	17.8%	-3.2%	6.3%
Antiinfectives for systemic use	13.0%	-0.5%	5.0%

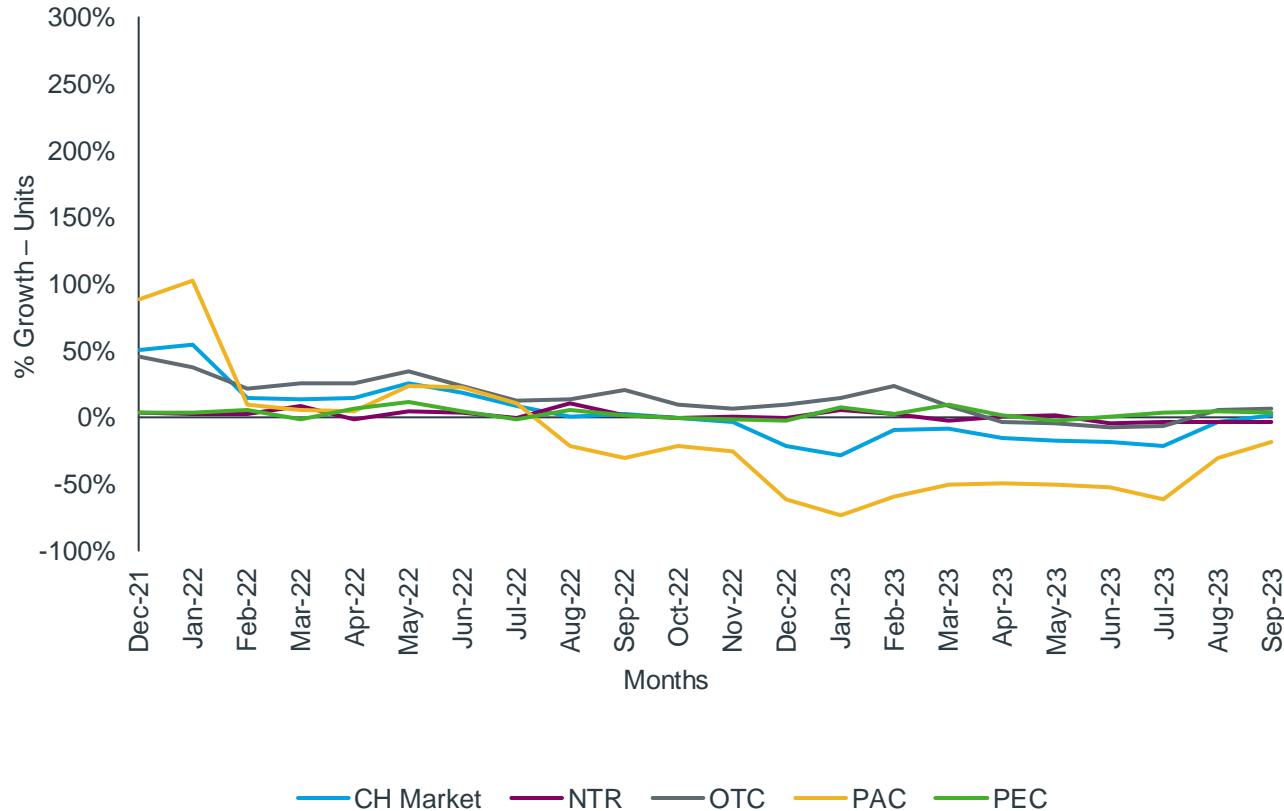
*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly data – November 2023 | Hospital panel



The Spanish consumer health market declined by 14.6% in YTD 2023 versus the same period in 2022, mostly influenced by patient care segment

**% Growth – Units Current Year vs. Same Month Previous Year
CH market and CH categories**



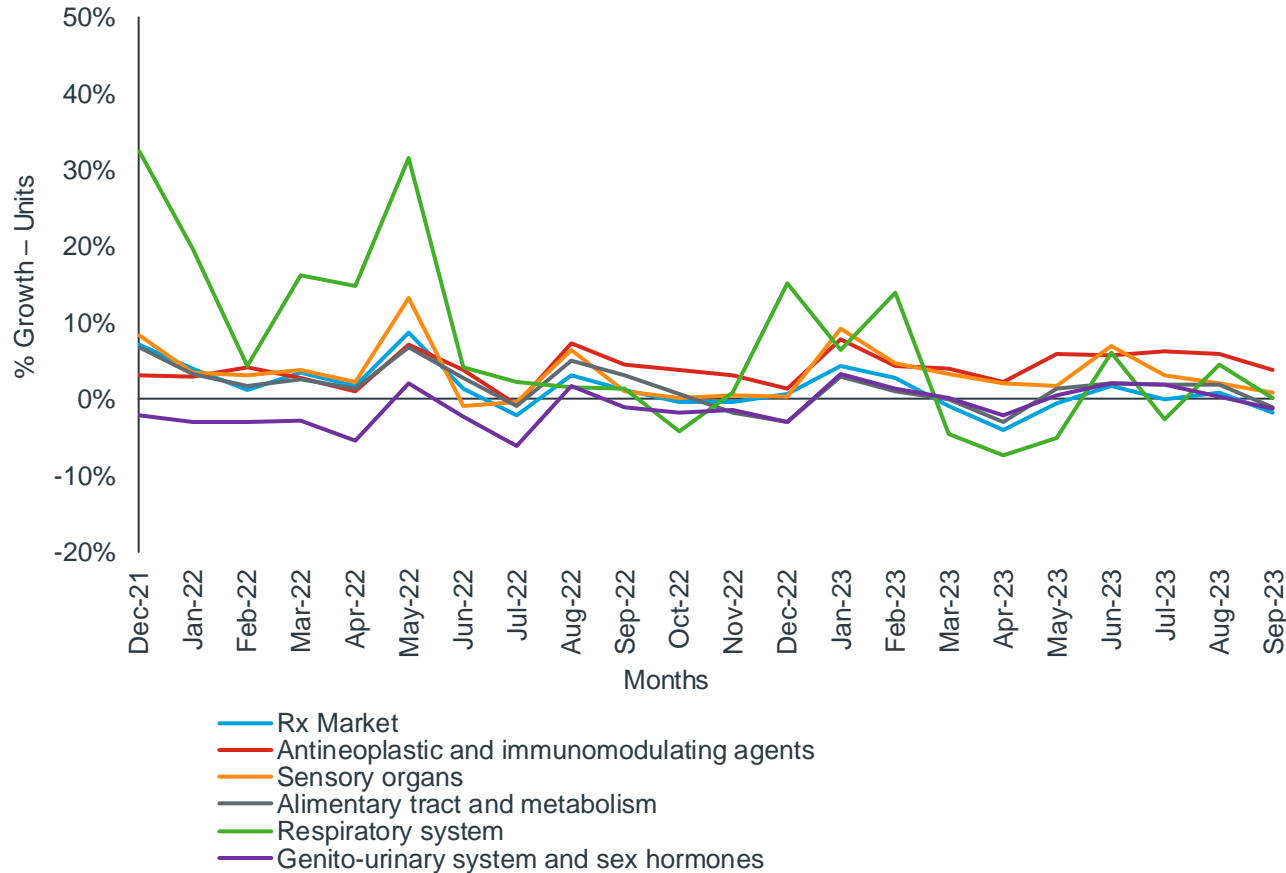
CH Categories and top* 2 classes within each category by Units Growth YTD 2023 vs. 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
CH Market	-28.5%	1.1%	-14.6%
Nutrition (NTR)	5.4%	-4.0%	-1.1%
Enteral Nutrition Products	9.3%	1.5%	3.7%
Baby Foods	5.4%	-2.4%	1.0%
Over-the-Counter Drugs (OTC)	14.75%	6.7%	3.9%
Cough, Cold And Other Respiratory Products	42.5%	13.9%	12.7%
Digest & Oth Intest Prod	15.2%	4.9%	4.5%
Patient Care (PAC)	-73.8%	-18.8%	-55.0%
Stomacare Products	6.7%	11.2%	8.1%
Orthopaed/Antirheum Aid	10.7%	8.3%	6.3%
Personal Care (PEC)	7.4%	3.5%	3.1%
Unisex Beauty Products	31.6%	7.1%	11.0%
Beauty Products For Women	11.5%	7.1%	5.7%

*Top in terms of YTD 2023 Growth
Source: IQVIA CH Customized Insights monthly sell-out data – November 2023



French retail market growth remained stable in YTD 2023 compared to the same period a year ago, sensory organ market remains at positive growth

**% Growth – Units Current Year vs. Same Month Previous Year
Total market and Top 5* YTD 2023**



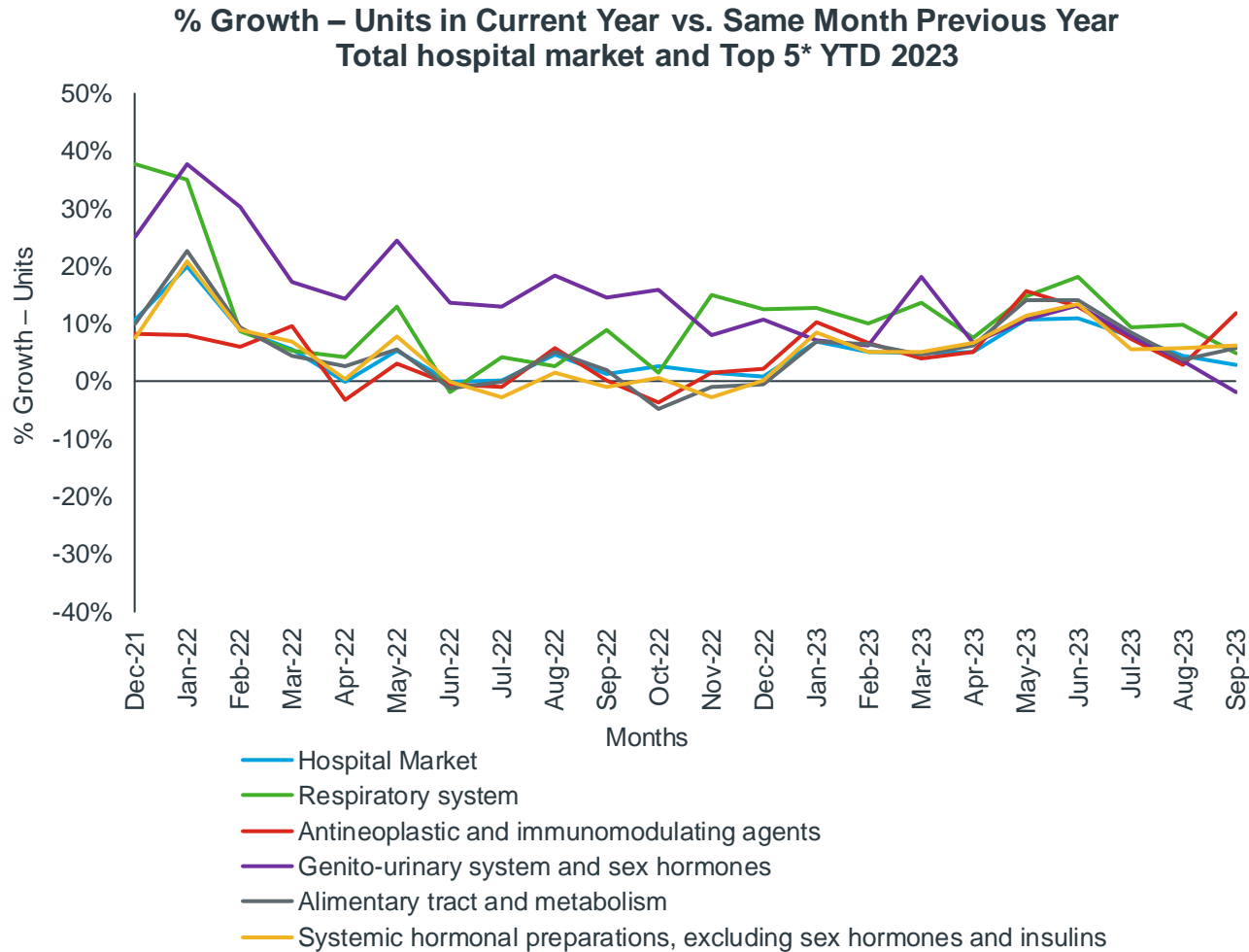
Top* 2 ATC3 classes within Top* 5 ATC1 classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Rx Market	4.3%	-1.7%	0.2%
Antineoplastic and immunomodulating agents	7.8%	3.8%	5.1%
Anti-Tnf Products	14.4%	5.8%	9.3%
Protein Kinase Inhibitor Antineoplastics	9.0%	8.5%	8.1%
Sensory organs	9.3%	0.9%	3.8%
Ocular Antineovasc.Prods	12.0%	5.3%	7.6%
Miotics+Antiglauc.Preps.	3.9%	-0.2%	1.3%
Alimentary tract and metabolism	2.9%	-1.1%	0.8%
Glp-1 Agonist A-Diabs	25.0%	17.4%	20.6%
Other Metabolic Products	3.6%	1.2%	2.7%
Respiratory system	6.5%	0.2%	0.7%
Anticholinergics In Combination With B2-Agonists	14.0%	13.5%	10.9%
All Oth A-Asthma & Copd	9.1%	6.4%	6.5%
Genito-urinary system and sex hormones	3.3%	-1.3%	0.7%
Erectile Dysfunction Prd	10.8%	3.2%	5.2%
Gonadotrophins	7.5%	1.6%	4.4%

*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly sell-out data – November 2023 | Retail pharmacy panel – captures sales of Rx products only



Hospital market in France grew 6.5% YTD by volume compared to the same period last year, driven by respiratory products



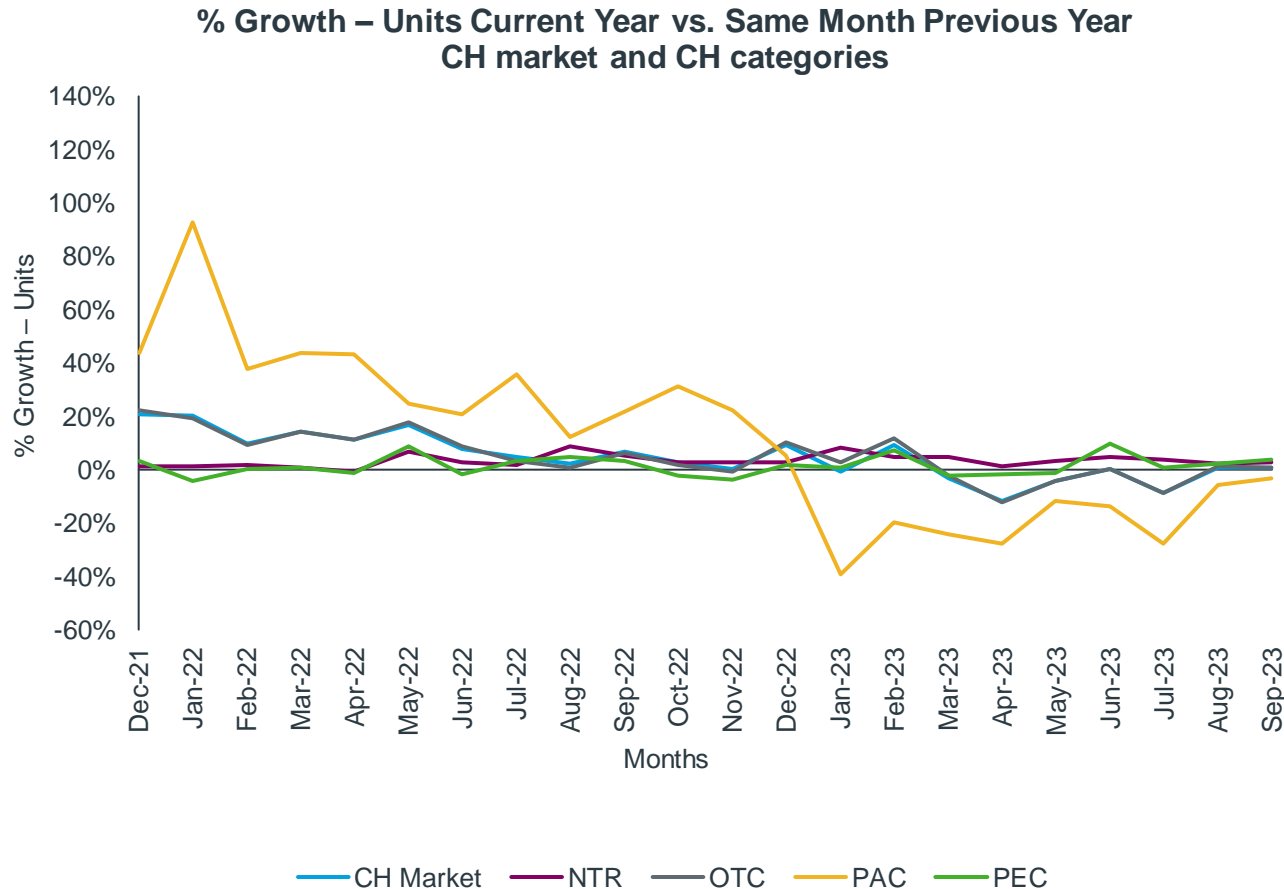
Top* 6 ATC Classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Hospital Market	6.9%	2.9%	6.5%
Respiratory system	12.8%	4.8%	11.4%
Genito-urinary system and sex hormones	10.3%	11.9%	8.5%
Antineoplastic and immunomodulating agents	7.2%	-2.0%	7.9%
Alimentary tract and metabolism	6.9%	5.7%	7.8%
Cardiovascular system	8.5%	6.2%	7.5%
Antiinfective for systemic use	4.0%	6.5%	6.7%

*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly data – November 2023 | Hospital panel



French consumer health market declined by 2.1% in YTD 2023 compared to the same period in 2022, driven by NTR products



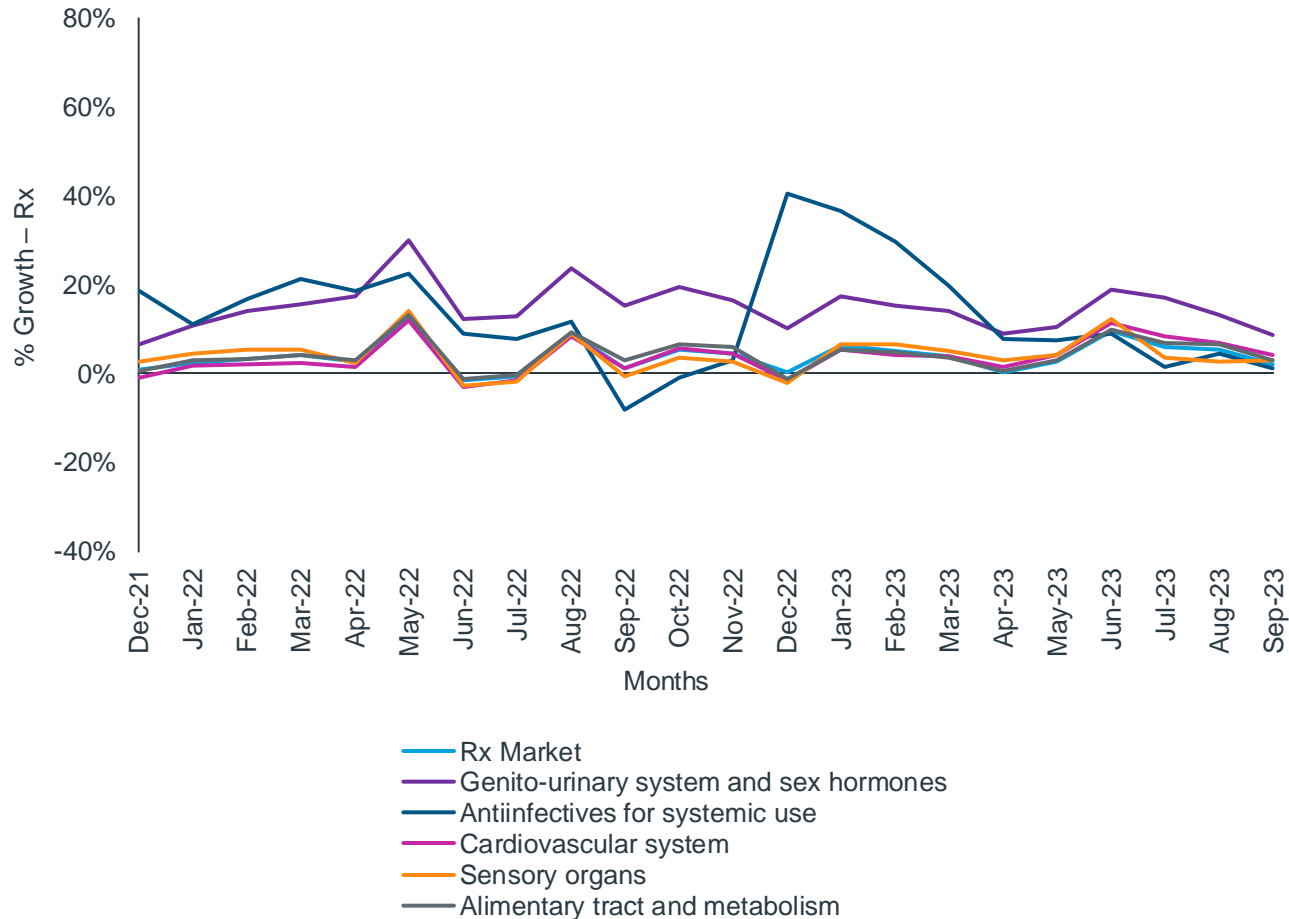
CH Categories and top* 2 classes within each category by Units Growth YTD 2023 vs. 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
CH Market	-0.5%	0.7%	-2.1%
Nutrition (NTR)	8.2%	2.6%	4.0%
Enteral Nutrition Products	11.7%	4.7%	6.1%
Baby Foods	-0.5%	-2.6%	-2.0%
Over-the-Counter Drugs (OTC)	2.85%	0.6%	-1.2%
Cough, Cold And Other Respiratory Products	22.5%	6.9%	9.0%
Eye Care	13.8%	0.4%	5.5%
Patient Care (PAC)	-39.4%	-3.2%	-20.5%
Advanced Dressings	14.9%	4.7%	5.2%
Surgical Absorbents	5.5%	1.8%	0.2%
Personal Care (PEC)	0.8%	3.9%	2.2%
Unisex Beauty Products	9.5%	5.9%	8.0%
Beauty Products For Women	6.2%	5.6%	3.9%

*Top in terms of YTD 2023 Growth
Source: IQVIA CH Customized Insights monthly sell-out data – November 2023



The UK retail prescription market grew by 4.6% in YTD 2023 compared to same period in 2022, led by Genito-urinary products

**% Growth – Units Current Year vs. Same Month Previous Year
Total retail Rx market and Top 5* ATC classes**



Top* 2 ATC3 classes within Top* 5 ATC1 classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Rx Market	6.3%	2.2%	4.6%
Genito-urinary system and sex hormones	17.3%	8.7%	13.8%
Urinary Anti-Infectives	5.1%	13.4%	15.1%
Erectile Dysfunction Prd	5.0%	6.0%	6.3%
Antiinfectives for systemic use	36.8%	1.1%	12.8%
Viral Vaccines	49.2%	29.8%	32.9%
Bacterial Vaccines	177.8%	30.0%	30.7%
Cardiovascular system	5.3%	4.1%	5.5%
Cholest&Trigly.Regulator	7.4%	7.9%	9.1%
Calcium Antagonist Plain	7.6%	5.7%	7.6%
Sensory organs	6.7%	2.9%	5.2%
Ocul.A-Aller.Decon.A-Sep	3.1%	11.6%	6.7%
Mitotics+Antiglaucl.Preps.	4.4%	0.0%	2.7%
Alimentary tract and metabolism	5.4%	2.9%	4.8%
SglT2 Inhibitor Antidiabetics	47.6%	39.7%	44.3%
Glp-1 Agonist A-Diabs	28.8%	3.3%	19.3%

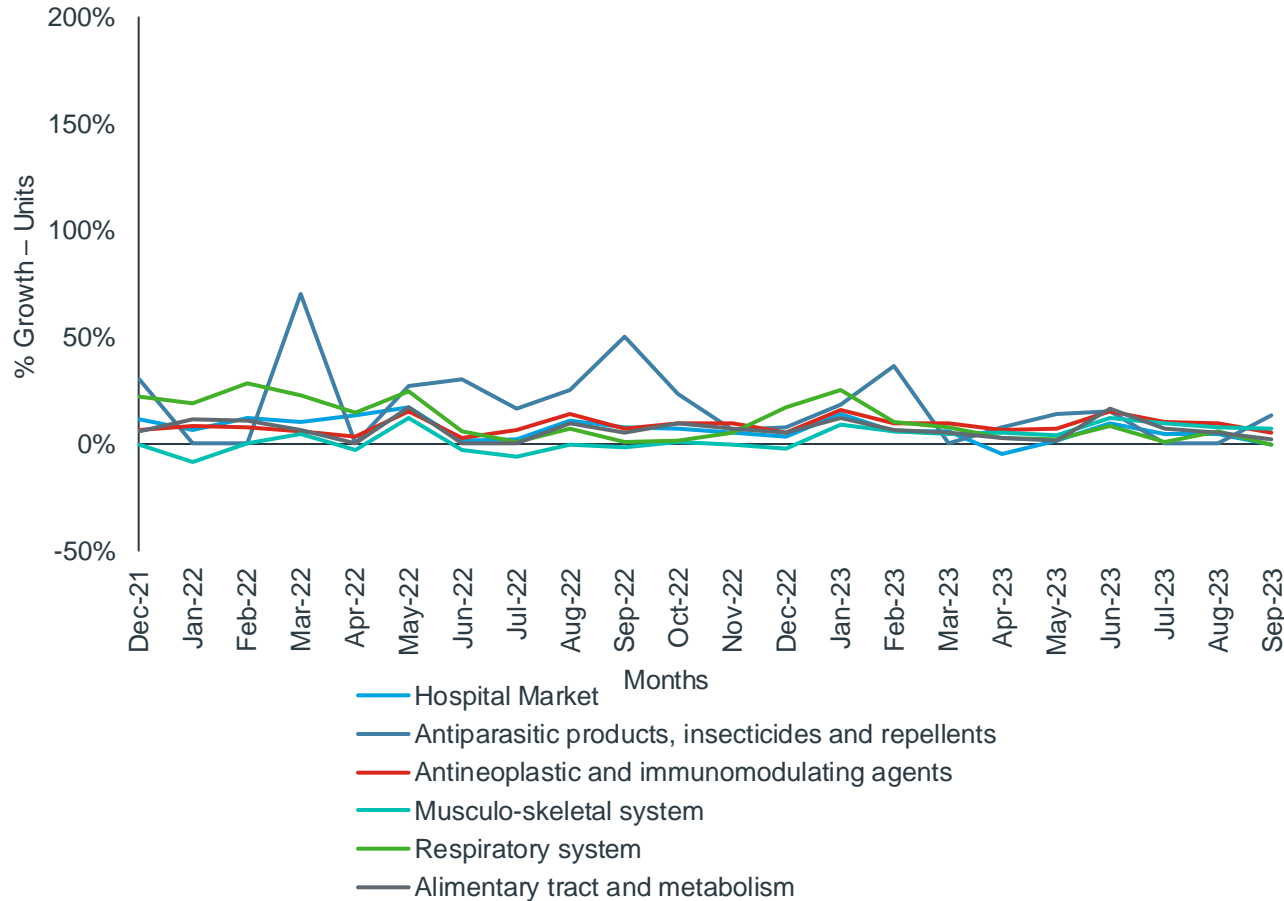
*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly sell-in data – November 2023 | Retail pharmacy panel – captures sales of Rx products only



The UK hospital market grew by 4.4% in YTD 2023 compared to the same period in 2022, driven by antiparasitic and antineoplastic products

**% Growth – Units in Current Year vs. Same Month Previous Year
Total hospital market and Top 5* YTD 2023**



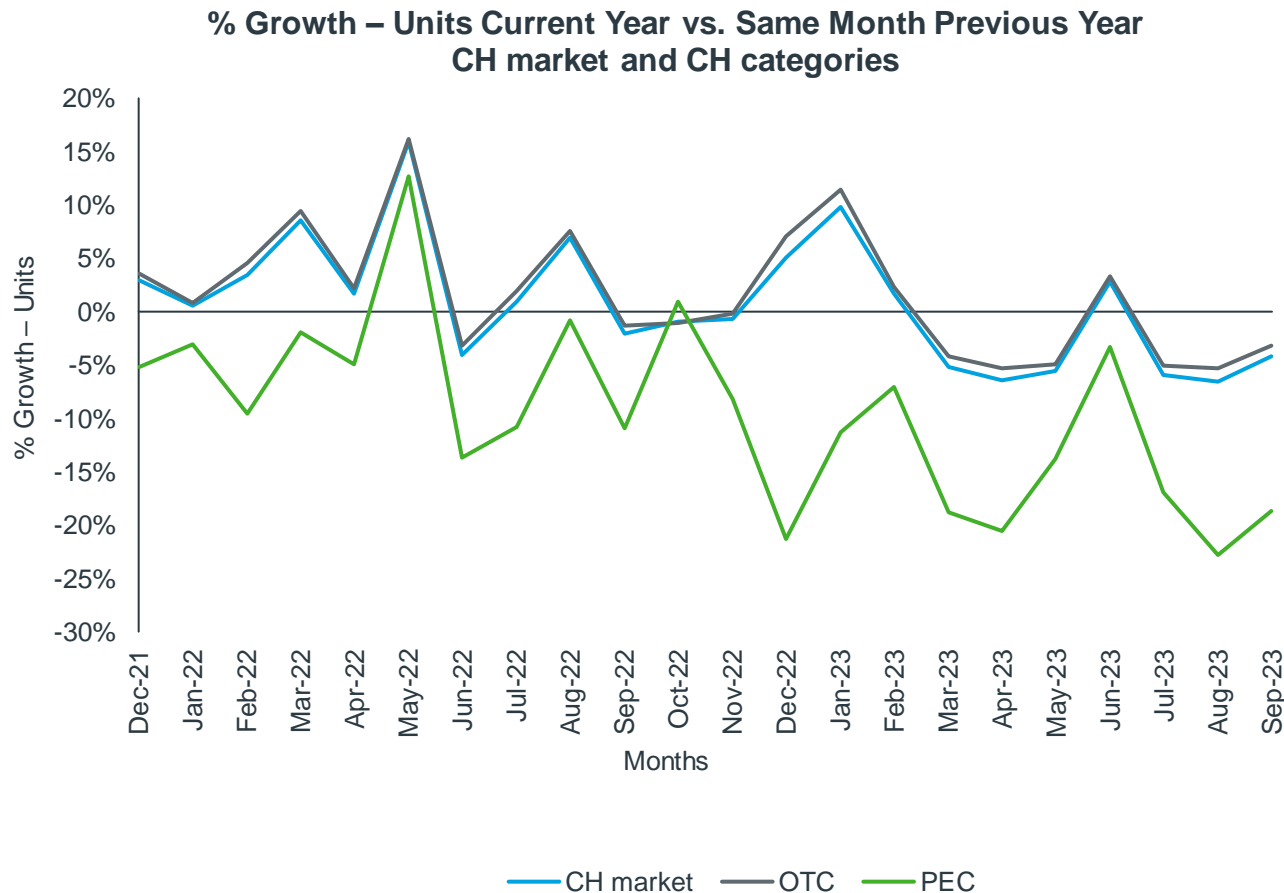
Top* 6 ATC Classes by Units Growth YTD 2023 vs. YTD 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
Hospital Market	13.7%	-0.6%	4.4%
Antiparasitic products, insecticides and repellents	18.2%	13.3%	10.6%
Antineoplastic and immunomodulating agents	15.8%	5.1%	9.8%
Musculo-skeletal system	9.0%	7.0%	7.2%
Respiratory system	25.1%	-0.2%	6.9%
Alimentary tract and metabolism	11.8%	1.9%	6.3%
Nervous system	13.3%	-0.4%	5.7%

*Top in terms of YTD 2023 Growth

Source: IQVIA MIDAS monthly data – November 2023 | Hospital panel



The UK consumer health market declined by 2.3% YTD compared to the same period last year



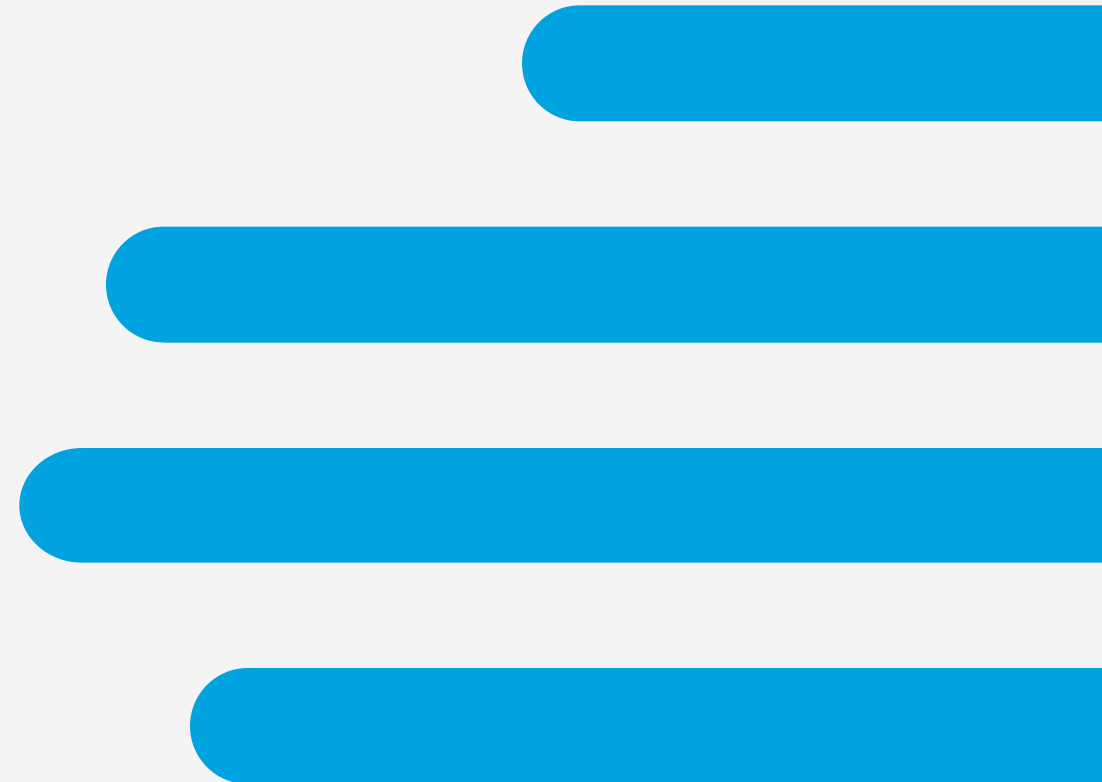
CH Categories and top* 2 classes within each category by Units Growth YTD 2023 vs. 2022	Units Growth Jan 2023 vs. 2022	Units Growth Latest month 2023 vs. 2022	Units Growth YTD 2023 vs. 2022
CH Market	9.8%	-4.2%	-2.3%
Over-the-Counter Drugs (OTC)	11.48%	-3.2%	-1.3%
Cough, Cold And Other Respiratory Products	39.3%	3.8%	4.5%
Vitamins, Minerals And Nutritional Supplements, Tonics And Other Stimulants	1.8%	1.3%	1.0%
Personal Care (PEC)	-11.3%	-18.7%	-14.9%
Unisex Beauty Products	-4.1%	-17.7%	-6.3%
Beauty Products For Women	13.0%	-12.0%	-8.4%

*Top in terms of YTD 2023 Growth

Note: IQVIA CH Customized Insights Data has coverage of only OTC (CHC 1-19,97 classes) and PEC (CHC 80-83, 85-94 classes) segment

Source: IQVIA CH Customized Insights monthly sell-in data – November 2023

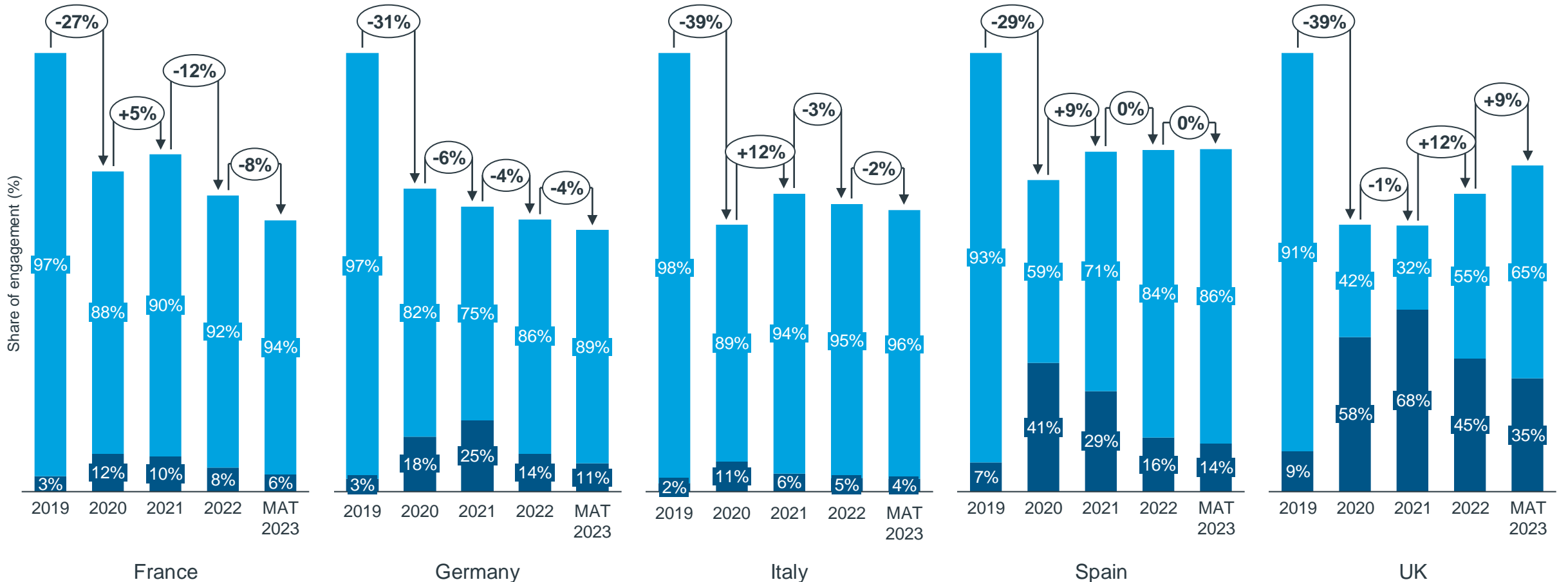
Engagement with Health Care Professionals



ChannelDynamics: Channel Volume Trends

Major Markets: Full year 2019 vs. 2020 vs. 2021 vs. 2022 and MAT October 2023

Share of F2F & Remote interaction in promotional volume



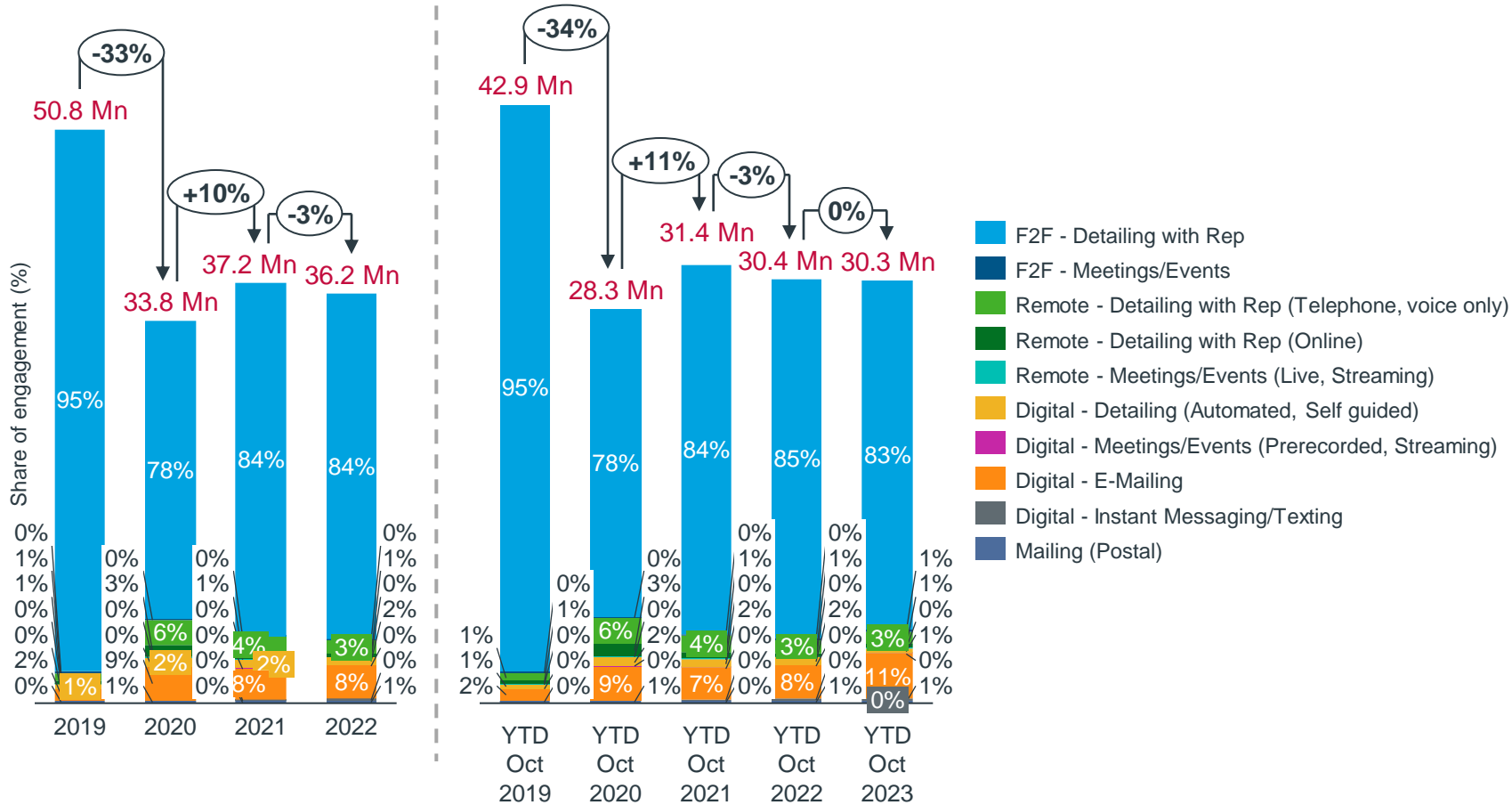
Source: IQVIA ChannelDynamics, F2F includes F2F detailing and F2F meetings, Remote includes phone detailing, e-detailing (live), e-meetings (live)



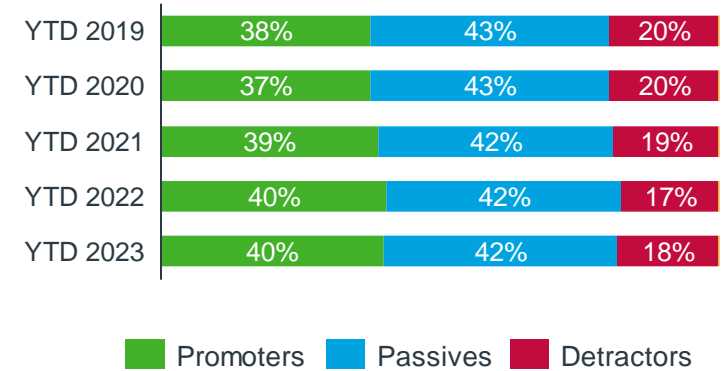
ChannelDynamics: Channel Volume and Performance Trends

Italy: Full year 2019 vs. 2020 vs. 2021 vs. 2022 and Year-to-date trends over 5 years

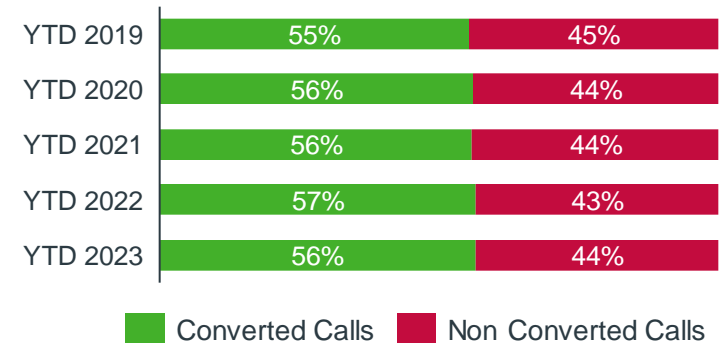
Share of projected promotional volume



NPS Category share



Converted Calls



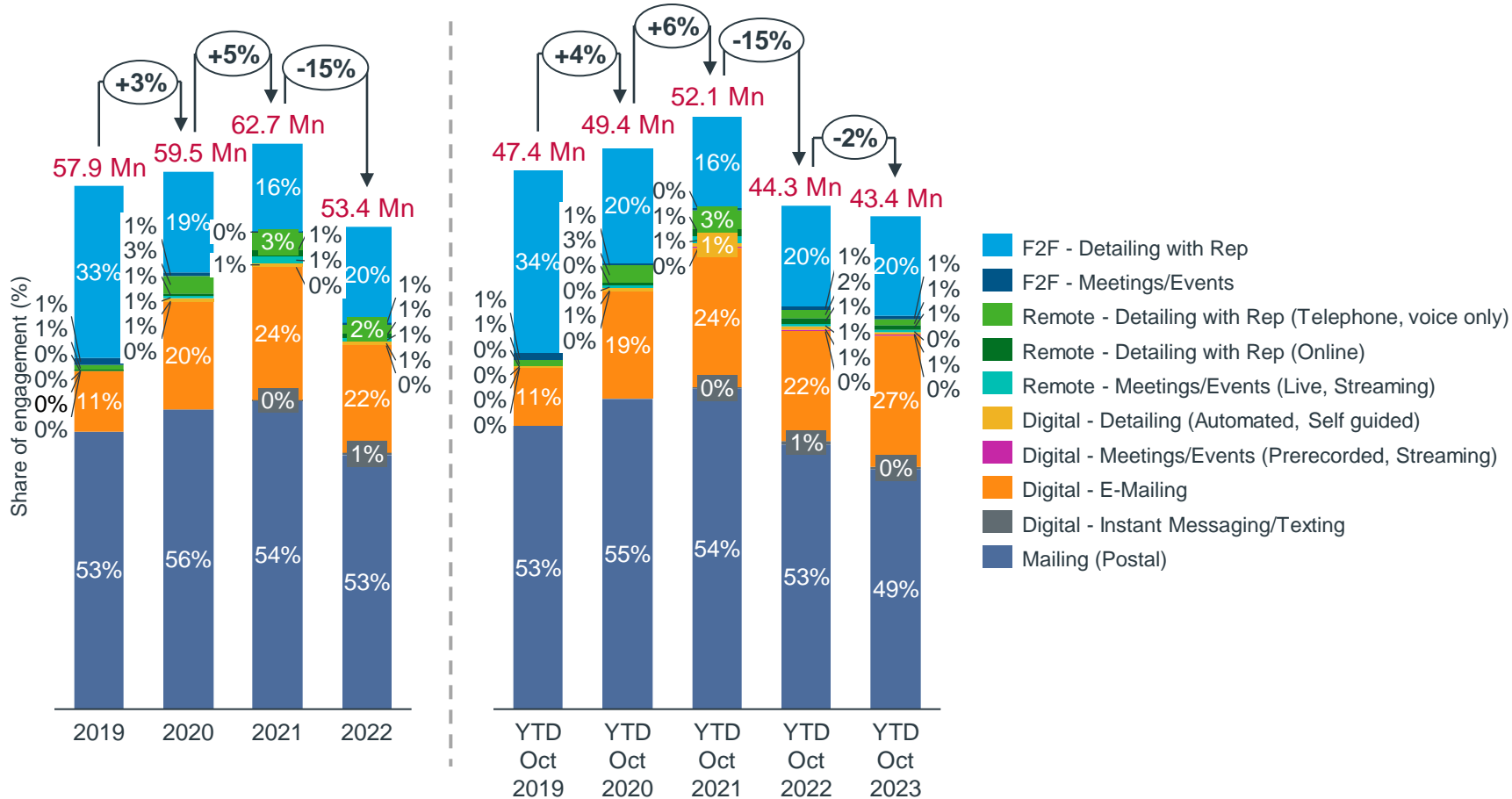
Source: IQVIA Global ChannelDynamics
Note: YTD data is till October for 2019, 2020, 2021, 2022 and 2023



ChannelDynamics: Channel Volume and Performance Trends

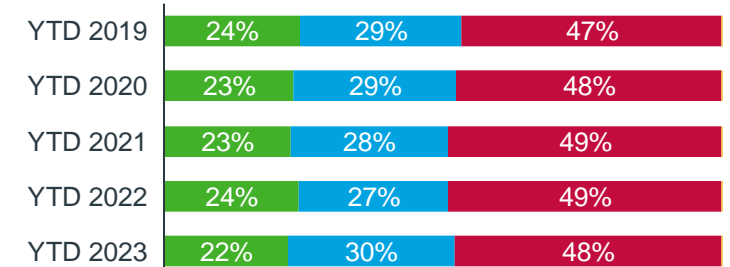
Germany: Full year 2019 vs. 2020 vs. 2021 vs. 2022 and Year-to-date trends over 5 years

Share of projected promotional volume



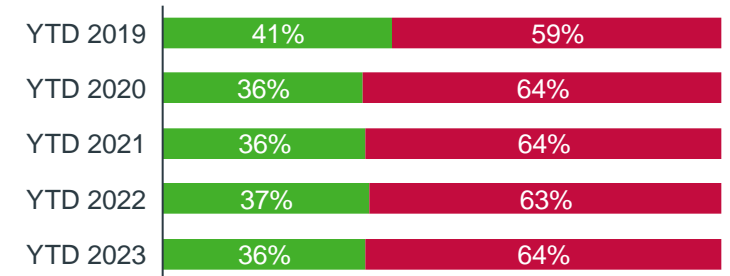
Source: IQVIA Global ChannelDynamics
 Note: YTD data is till October for 2019, 2020, 2021, 2022 and 2023

NPS Category share



Promoters Passives Detractors

Converted Calls



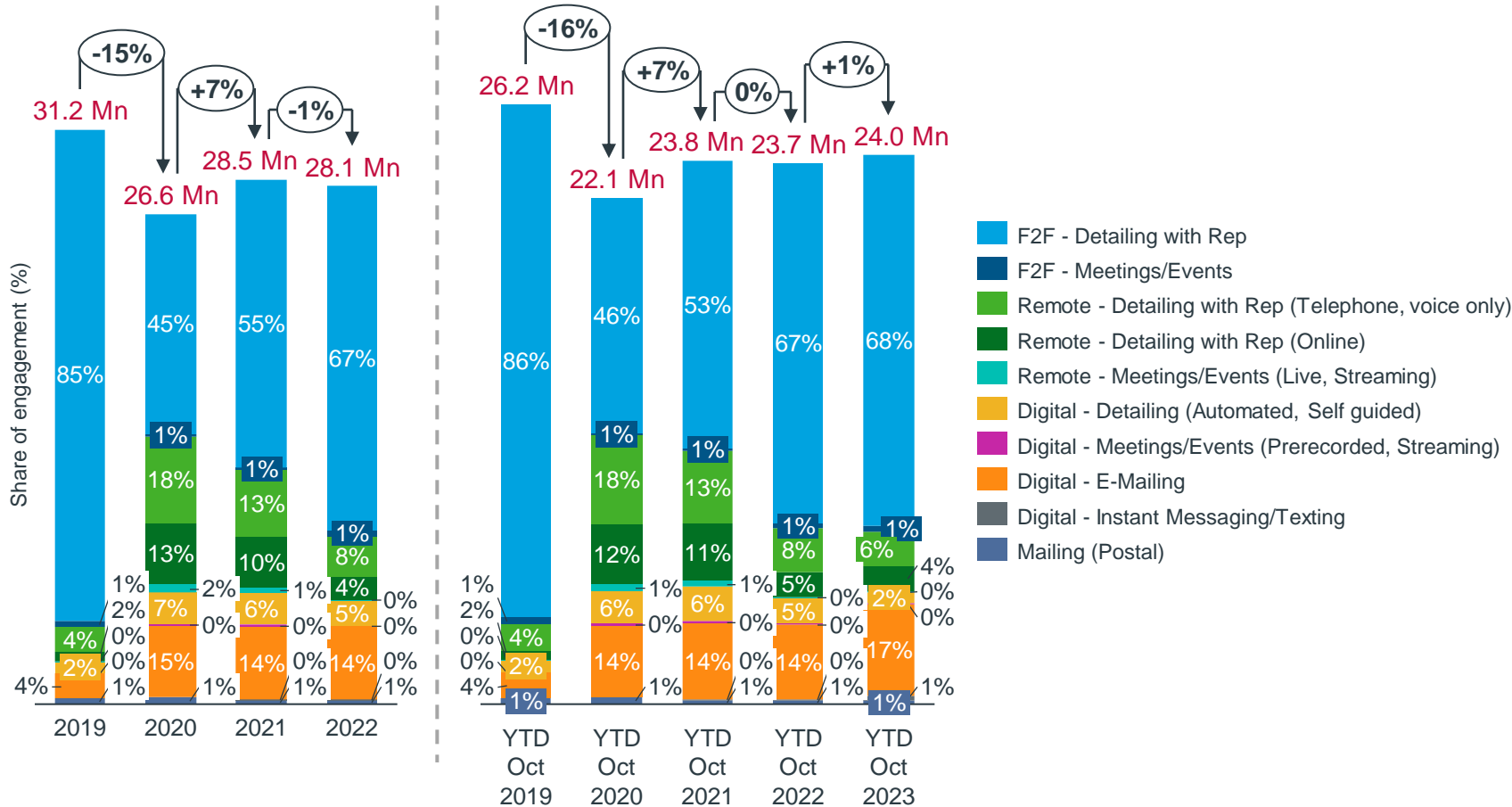
Converted Calls Non Converted Calls



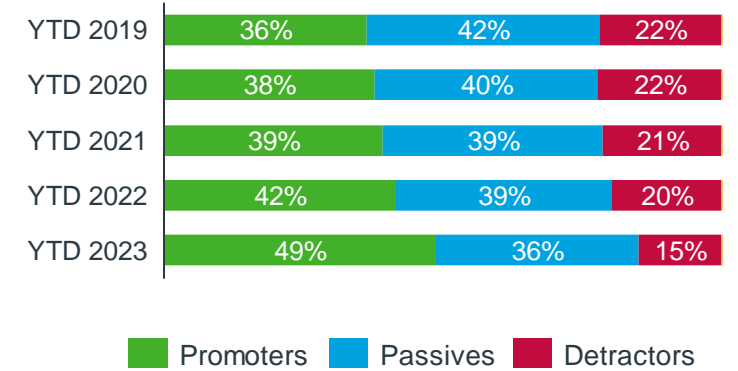
ChannelDynamics: Channel Volume and Performance Trends

Spain: Full year 2019 vs. 2020 vs. 2021 vs. 2022 and Year-to-date trends over 5 years

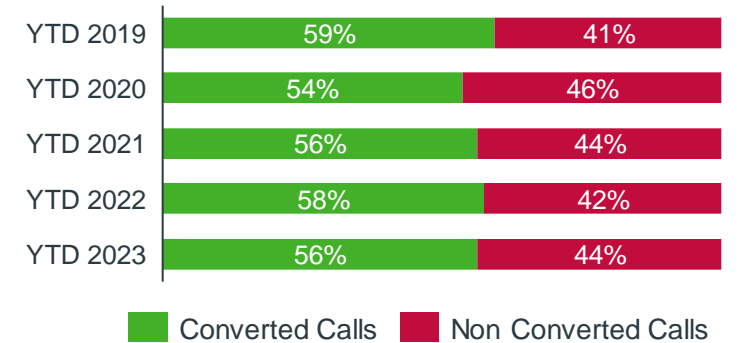
Share of projected promotional volume



NPS Category share



Converted Calls



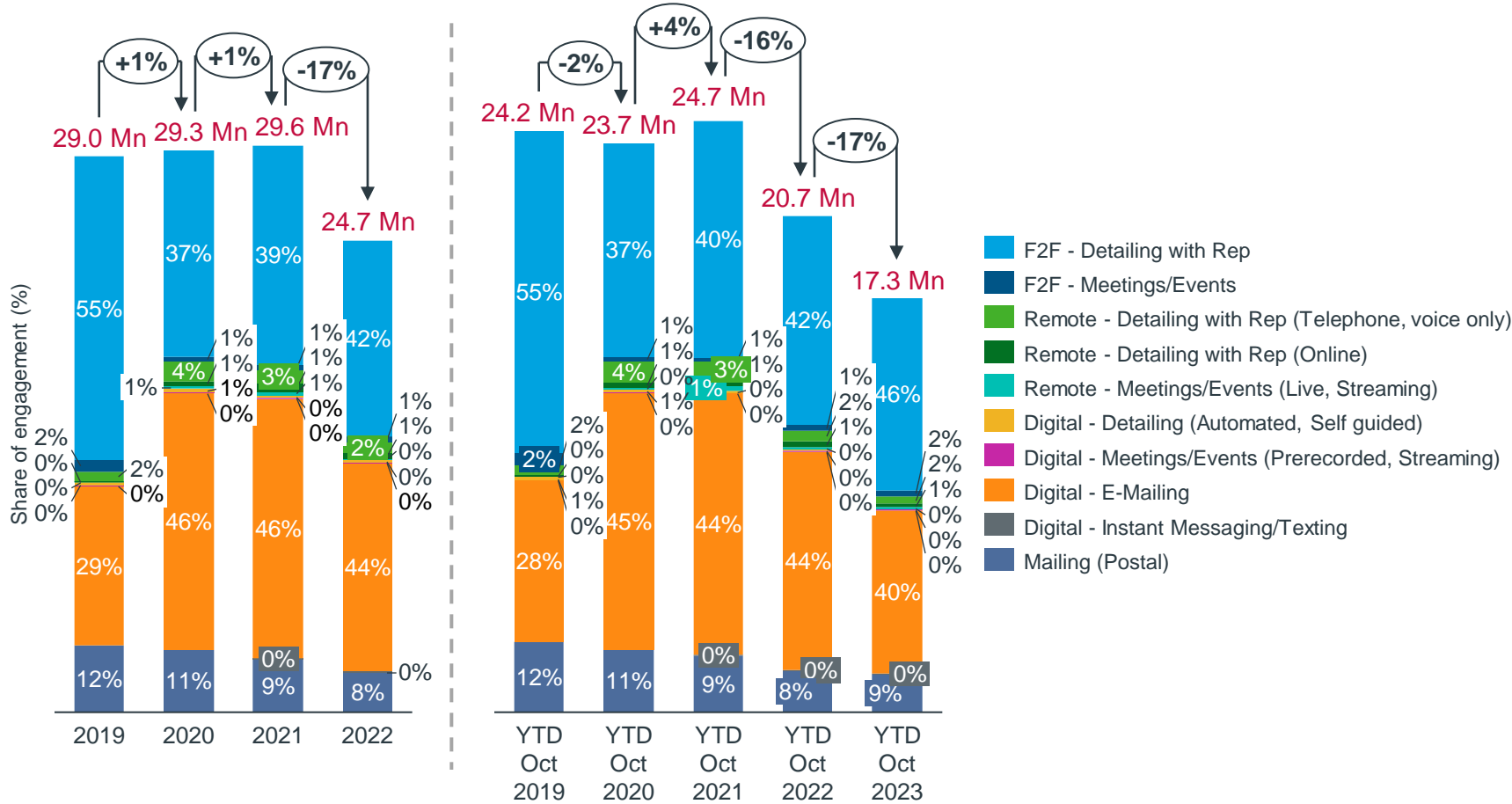
Source: IQVIA Global ChannelDynamics
 Note: YTD data is till October for 2019, 2020, 2021, 2022 and 2023



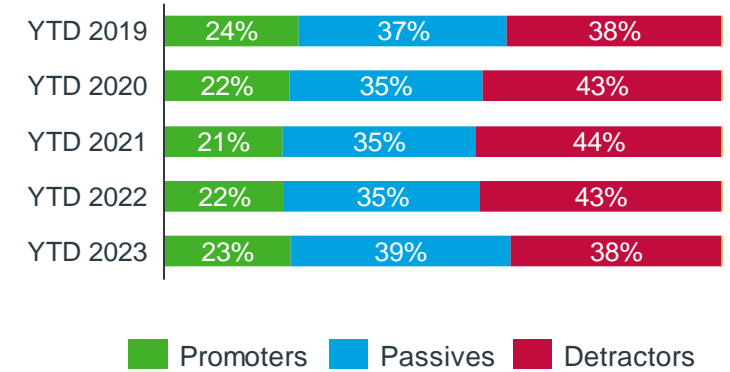
ChannelDynamics: Channel Volume and Performance Trends

France: Full year 2019 vs. 2020 vs. 2021 vs. 2022 and Year-to-date trends over 5 years

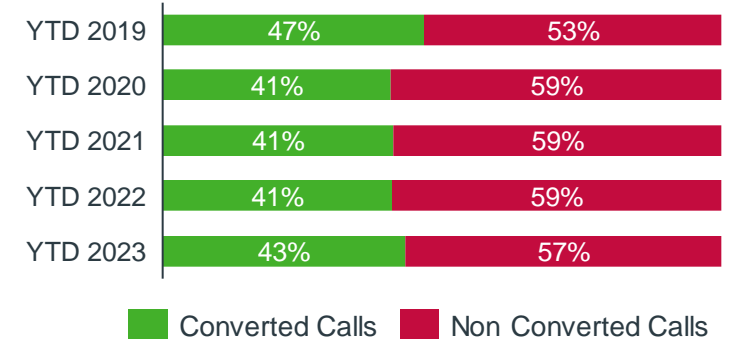
Share of projected promotional volume



NPS Category share



Converted Calls



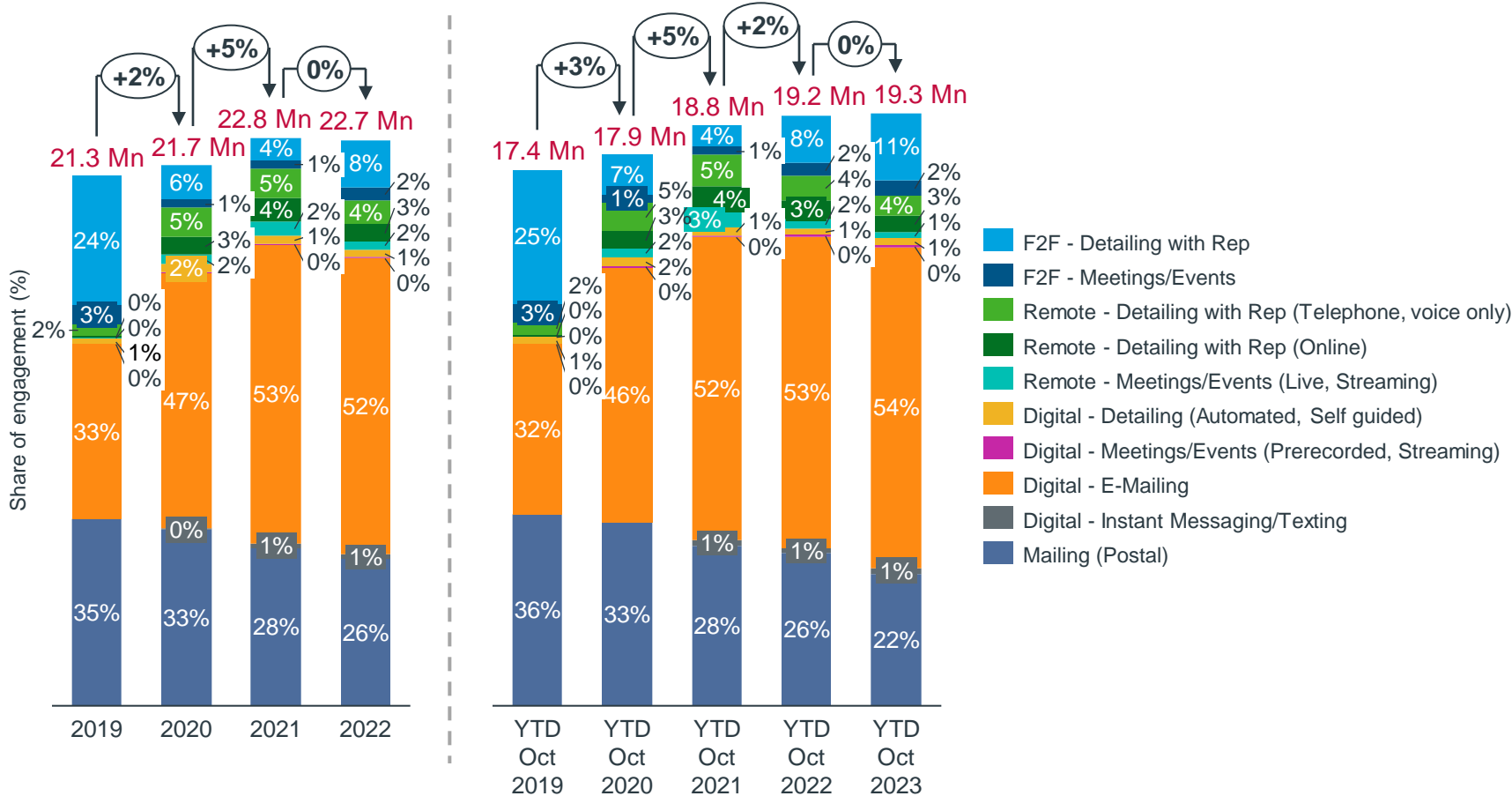
Source: IQVIA Global ChannelDynamics
 Note: YTD data is till October for 2019, 2020, 2021, 2022 and 2023



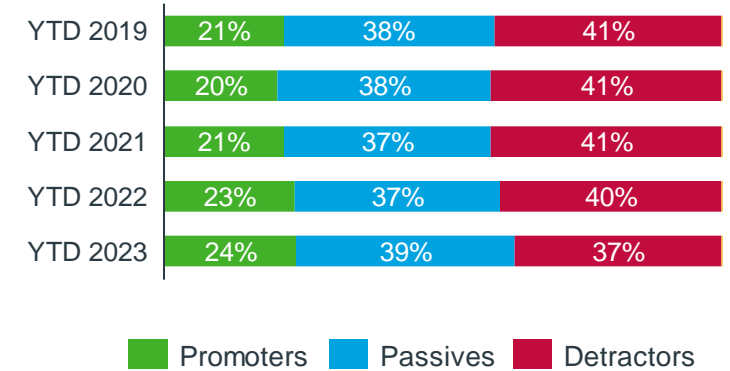
ChannelDynamics: Channel Volume and Performance Trends

UK: Full year 2019 vs. 2020 vs. 2021 vs. 2022 and Year-to-date trends over 5 years

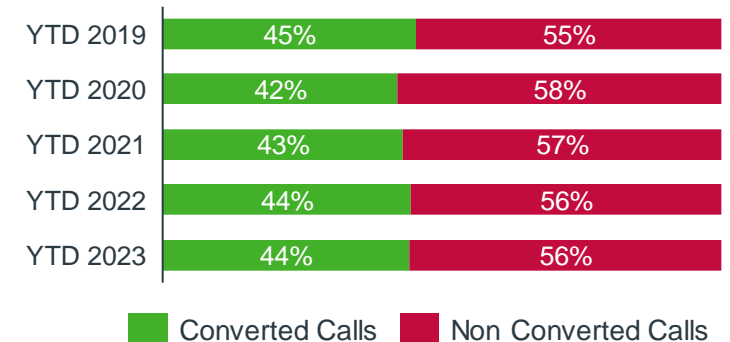
Share of projected promotional volume



NPS Category share

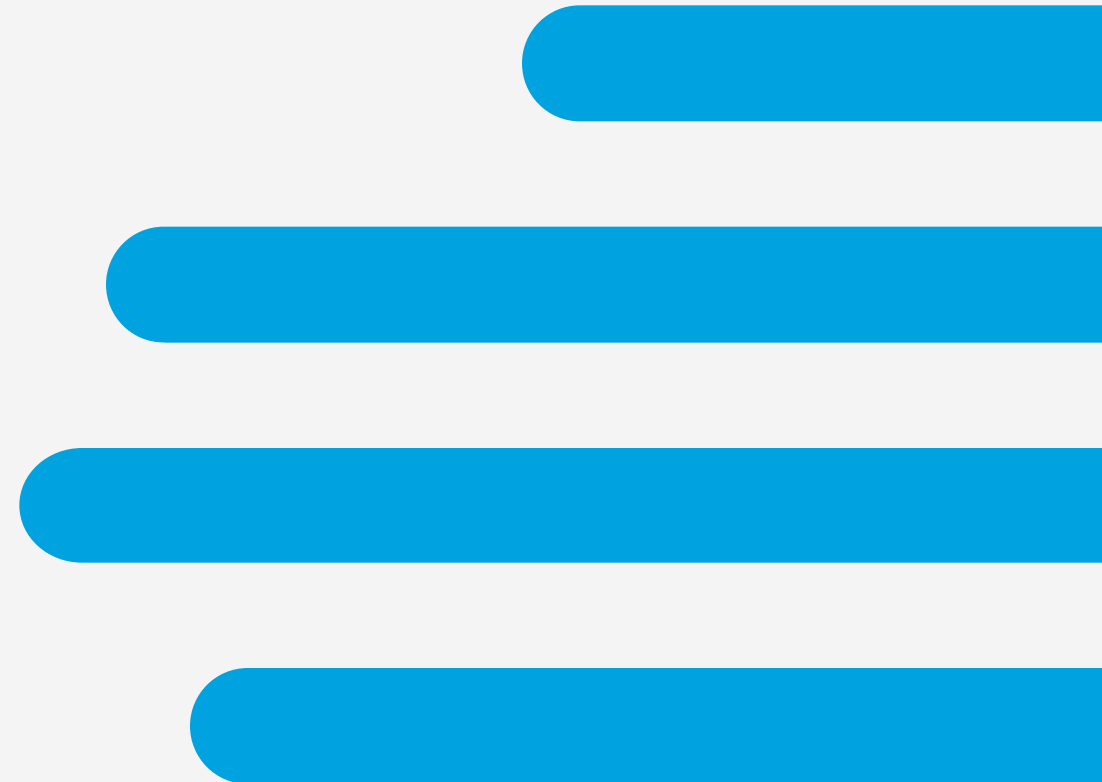


Converted Calls



Source: IQVIA Global ChannelDynamics
 Note: YTD data is till October for 2019, 2020, 2021, 2022 and 2023

Appendix: Data Sources and Methodology



Sources from secondary data research (1/2)

Global Market Prognosis (Slide 3,4,5,6)

Slide 3,4,5,6

- IQVIA Market Prognosis Report Sep 2023

Biosimilar Market Trends 2023-2032 (Slide 8,9,10,11)

Slide 8

- [Unlocking Biosimilar Potential 2023](#)
- [Assessing the Biosimilar Void 2023](#)

Slide 9

- [Unlocking Biosimilar Potential 2023](#)
- [Assessing the Biosimilar Void 2023](#)
- [The Impact of Biosimilar Competition in Europe 2022](#)

Slide 10

- [Assessing the Biosimilar Void 2023](#)

Slide 11

- [Unlocking Biosimilar Potential 2023](#)
- [Assessing the Biosimilar Void 2023](#)

Please note: IQVIA is not accountable for the accuracy of information from external data sources

Sources from secondary data research (2/2)

Evolving Landscape of Vaccine Market (Slides 13,14,15,16)

Slides 13,14

- [Race for Immunity: Exploring the Evolving Landscape of the Vaccines Market](#)

Slide 15

- IQVIA Analytics Link

Slide 16

- [Race for Immunity: Exploring the Evolving Landscape of the Vaccines Market](#)

Updates on COVID-19 Pipeline (Slides 18,19, 20)

Slide 18

- IQVIA Pipeline Intelligence

Slide 19

- [US-FDA news 2023](#)
- [European Commission news 2023](#)
- [Japan news 2023](#)
- [STIKO Germany](#)
- [France vaccination program](#)
- [France COVID-19 variant](#)
- [WHO news 2023](#)

Please note: IQVIA is not accountable for the accuracy of information from external data sources

IQVIA Sales Data Offerings Used and Methodology (1/2)

Data source	Frequency	Data source description	Geographic scope of data used in this report	Measures used for analysis	Calculations applied
Sell-out Data (IQVIA MIDAS, IQVIA CH Customized Insights)	Monthly	<p>Details on sales of products dispensed at retail pharmacies</p> <p>This includes both prescription and non-prescription products</p> <p>Prescription products are classified using ATC classification</p> <p>Consumer health products cover products from OTC, PAC, PEC and NTR</p>	<ul style="list-style-type: none"> Italy: Rx and CH markets Germany: Rx and CH markets Spain: Rx and CH markets France: Rx and CH markets 	<ul style="list-style-type: none"> Italy: Units Germany: Units Spain: Units France: Units 	<p>Italy, Germany, Spain, France:</p> <ul style="list-style-type: none"> Units Growth Jan 2023 vs. 2022 – To provide base view of the market from pre COVID-19 period (2019) in the years 2020, 2021 and 2022 Units Growth Latest month 2023 vs. 2022 – To provide the latest trend in the market to understand the dynamic changes in trends Units Growth YTD 2023 vs. 2022 – To provide the YTD trend in the market to understand the long-term changes in trends
Sell-in Data (IQVIA MIDAS, IQVIA CH Customized Insights)	Monthly	<p>Details on sales of products dispensed at retail pharmacies</p> <p>This includes both prescription and non-prescription products</p> <p>Prescription products are classified using ATC classification.</p> <p>Consumer health products covers products from only OTC segment</p>	<ul style="list-style-type: none"> UK: Rx and CH markets 	<ul style="list-style-type: none"> UK: Units 	<p>UK:</p> <ul style="list-style-type: none"> Units Growth Jan 2023 vs. 2022 – To provide base view of the market from pre COVID-19 period (2019) in the year 2020, 2021 and 2022 Units Growth Latest month 2023 vs. 2022 – To provide the latest trend in the market to understand the dynamic changes in trends Units Growth YTD 2023 vs. 2022 – To provide the YTD trend in the market to understand the long-term changes in trends

IQVIA Sales Data Offerings Used and Methodology (2/2)

Data source	Frequency	Data source description	Geographic scope of data used in this report	Measures used for analysis	Calculations applied
IQVIA MIDAS Data	Monthly	Details on hospital panel retail sales	<ul style="list-style-type: none"> Italy hospital market Germany hospital market Spain hospital market France hospital market UK hospital market 	<ul style="list-style-type: none"> Italy: Units Germany: Units Spain: Units France: Units UK: Units 	<p>Italy, Germany, Spain, France, UK:</p> <ul style="list-style-type: none"> Units Growth May 2021 to YTD 2023 – To provide the latest trend in the market to understand the dynamic changes in trends

Market definitions – at ATC3 level of classification

Oncology	Respiratory	Diabetes	Vaccines	Cardiovascular		
<p>L1A: Alkylating agents</p> <p>L1B: Antimetabolites</p> <p>L1C: Plant-based antineoplastics</p> <p>L1D: Antineoplastic antibiotics</p> <p>L1F: Platinum antineoplastics</p> <p>L1G: Monoclonal antibody antineoplastics</p> <p>L1H: Protein kinase inhibitor antineoplastics</p> <p>L1X: All other antineoplastics</p> <p>L2A: Cytostatic hormones</p> <p>L2B: Cyto hormone antagonists</p> <p>V3C: Radiopharmaceuticals</p>	<p>Anti-asthma and COPD:</p> <p>R3A: B2-agonists</p> <p>R3B: Xanthines</p> <p>R3C: N-steroidal respiratory anti-inflammatory</p> <p>R3D: Corticoids</p> <p>R3E: B2-agonist and R3C combinations</p> <p>R3F: B2-agonist and corticoid combinations</p> <p>R3H: PDE4 inhibitors, asthma/COPD</p> <p>R3I: Devices asthmatic conditions</p> <p>R3J: Antileukotriene anti-asthmatics</p> <p>R3X: All other anti-asthma and COPD products</p>	<p>Cough, cold including Flu anti-virals:</p> <p>R5A: Cold preparations</p> <p>R5B: Cough/cold preparations with anti-infectives</p> <p>R5C: Expectorants</p> <p>R5D: Antitussives</p> <p>R5F: Other cough and cold preparations</p> <p>R4A: Chest rubs and other inhalants</p> <p>R2A: Throat preparations</p> <p>J5B: Antivirals, other</p>	<p>A10C: Human insulin + analogues</p> <p>A10D: Animal insulin</p> <p>A10H: Sulphonylurea antidiabetics</p> <p>A10J: Biguanide antidiabetics</p> <p>A10K: Glitazone antidiabetics</p> <p>A10L: Alpha-glucosidase inhibitor antidiabetics</p> <p>A10M: Glinide antidiabetics</p> <p>A10N: DPP-IV inhibitor antidiabetics</p> <p>A10P: SGLT2 inhibitor antidiabetics</p> <p>A10S: GLP-1 agonist anti-diabetics</p> <p>A10X: Other drugs for diabetes</p> <p>H4B: Glucagon</p>	<p>J7B: Combination of vaccines</p> <p>J7D: Bacterial vaccines</p> <p>J7E: Viral vaccines</p> <p>J7X: All other vaccine-like products</p>	<p>Antihypertensives:</p> <p>C2A: Antihypertensives (of non herbal origin) plain</p> <p>C2B: Antihypertensives (of non herbal origin), combination with diuretics</p> <p>C2C: Rauwolfia alkaloids and other antihypertensives of herbal origin</p> <p>C2D: Rauwolfia alkaloids and other antihypertensives of herbal origin in combination with diuretics</p> <p>C3A: Diuretics</p> <p>C7A: Beta-blocking agents, plain</p> <p>C7B: Beta-blocking agents, combinations</p> <p>C8A: Calcium antagonists, plain</p> <p>C8B: Calcium antagonists, combinations</p> <p>C9A: ACE inhibitors, plain</p> <p>C9B: ACE inhibitors, combinations</p> <p>C9C: Angiotensin-II antagonists, plain</p> <p>C9D: Angiotensin-II antagonists, combinations</p> <p>C9X: Other renin-angiotensin agents</p>	<p>Anticoagulants:</p> <p>B1A: Vit K antagonists</p> <p>B1B: Heparins</p> <p>B1C: Platelet aggregation inhibitors</p> <p>B1D: Fibrinolytics</p> <p>B1E: Direct thrombin inhibitors</p> <p>B1F: Direct Factor XA inhibitors</p> <p>B1X: Other antithrombotic agents</p> <p>B2C: Proteinase inhibitors</p> <p>Lipid regulators:</p> <p>C10A: Cholesterol and triglyceride regulating preparations</p> <p>C10C: Lipid regulators, in combinations with other lipid regulators</p> <p>C11A: Lipid-regulating cardiovascular multi-therapy combination products</p>

Market definitions – at ATC3 level of classification and Oral vs. IV/SC

Immunology	Pain
L4B: Anti-Tnf Products M1C: Spec Antirheumatic Agent	M1A: Antirheumatic N-Steroid M1B: Antirheumat Steroid Comb M2A: Top A-Rheumatics & Analg M3A: Muscle Relaxant, Peripher M5X: Oth Musculo-Skeletal Prd N2A: Narcotic Analgesics N2B: Non-Narcotic Analgesics N2C: Anti-Migraine Preps N1A: Anaesthetics General N1B: Anaesthetics, Local

NFC 1	Category
A (ORAL SOLID ORDINARY)	Oral
B (ORAL SOLID LONG-ACTING)	Oral
D (ORAL LIQUID ORDINARY)	Oral
E (ORAL LIQUID LONG-ACTING)	Oral
F (PARENTERAL ORDINARY)	IV/SC formulations
G (PARENTERAL LONG-ACTING)	IV/SC formulations

Channel Definitions (Slides 21-27)



F2F Detailing: Sales Rep face-to-face detailing



F2F Meetings: Meetings, events, congresses, seminars



E-Detailing: Online presentations – live with a rep or automated, self guided



Phone Detailing: Telephone communication with reps



E-Meetings: Streaming video – live webinar or pre-recorded webcast



Email: Opened email communication



Postal: Opened paper mail received by post

Face to face interactions

Remote interactions



Thank you

