The Pharmaceutical Industry in Germany

Pharmaceutical companies: 903 (as per trade registries)
Biotechnology companies: 400
Manufacturing: 26.9 billion Euro (+ 1.6 % compared to 2009)
Pharmaceutical exports: 51.1 billion Euro (+ 8.0 % compared to 2009)
  Main importers:
    Belgium: 10.5 billion Euro
    Netherlands: 6.6 billion Euro
    USA: 5.0 billion Euro
    Switzerland: 2.8 billion Euro
Employees: 103,208*
R&D expenditures: 5.5 billion Euro

The Global Pharmaceutical Market**

Total market: 633.9 bill. Euro (+5.7 % compared to 2009)
North America: 244.6 bill. Euro (+4.0 % compared to 2009)
EU: 173.6 bill. Euro (-0.3 % compared to 2009)
Asia, Africa, Australasia***: 172.2 bill. Euro (+15.9 % compared to 2009)
Japan: 70.9 bill. Euro (+7.2 % compared to 2009)
Latin America: 43.5 bill. Euro (+21.4 % compared to 2009)

Pharmaceuticals in the German Health Care System

Total SHI expenditures: 174.5 bill. Euro (+2.2 % compared to 2009)
SHI expenditures for pharmaceuticals: 30.2 bill. Euro (-1.7 % compared to 2009)
% of pharmaceuticals of total expenditures: 17.3 %

* New statistic implemented by the Federal Statistical Office in 2010. No comparison to previous years available.
** The Euro values are based on a recalculation of the market data of the base values in US Dollars (Exchange rate: US Dollars in Euro = 1: 0.736).
*** The region “Asia, Africa, Australasia” includes the values for Japan.
The German Pharmacy Market

Total turnover in the pharmacy market:
(based on manufacturer price): 25.6 billion Euro
(+3.8 % compared to 2009)

Prescription-only drugs: 20.4 billion Euro (+5.0 %)
Pharmacy-only drugs: 2.8 billion Euro (-3.3 %)

Top 10 leading indications (ATC-3) in the SHI market 2010 according to turnover

<table>
<thead>
<tr>
<th>Indication areas (ATC-3)</th>
<th>In million Euros</th>
<th>% to previous year</th>
<th>%-share of total volume</th>
<th>%-share of total turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>31,923.0</td>
<td>3.38</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>A10C human insulin and analogs</td>
<td>1,193.7</td>
<td>1.72</td>
<td>1.77</td>
<td>3.74</td>
</tr>
<tr>
<td>N05A antipsychotics</td>
<td>1,149.3</td>
<td>6.74</td>
<td>1.76</td>
<td>3.60</td>
</tr>
<tr>
<td>L04B Anti-TNF preparations</td>
<td>1,097.7</td>
<td>20.73</td>
<td>0.04</td>
<td>3.44</td>
</tr>
<tr>
<td>N02A analgesics, narcotics</td>
<td>925.0</td>
<td>4.80</td>
<td>0.92</td>
<td>2.90</td>
</tr>
<tr>
<td>A02B ulcer treatments</td>
<td>917.8</td>
<td>12.37</td>
<td>4.12</td>
<td>2.88</td>
</tr>
<tr>
<td>T02D diabetes tests</td>
<td>896.8</td>
<td>4.79</td>
<td>3.46</td>
<td>2.81</td>
</tr>
<tr>
<td>N03A antiepileptics</td>
<td>819.2</td>
<td>9.30</td>
<td>1.36</td>
<td>2.57</td>
</tr>
<tr>
<td>N06A antidepressants / mood stabilizers</td>
<td>812.7</td>
<td>7.17</td>
<td>2.88</td>
<td>2.55</td>
</tr>
<tr>
<td>L03B interferons</td>
<td>795.2</td>
<td>3.76</td>
<td>0.05</td>
<td>2.49</td>
</tr>
<tr>
<td>C09D angiotensin-II antagonists, combinations</td>
<td>782.8</td>
<td>8.50</td>
<td>1.14</td>
<td>2.45</td>
</tr>
</tbody>
</table>

Source: Illustration of the BPI based on data of Insight Health 2011.

Pharmaceutical Drug Prices

Development of drug prices in SHI system: -2.0 % (compared to 2009)

Number of Pharmaceutical Drugs

“ROTE LISTE®“ 2011 includes: 8,280 preparation listings

The numbers summarized here are in reference to the year 2010, unless otherwise specified. Sources for the data and more in-depth information can be found in the “Pharma-Data 2011“ booklet.