The Pharmaceutical Industry in Germany

Pharmaceutical companies: 899 (as per trade registries)
Biotechnology companies: 397
Manufacturing: 26.9 billion Euro (+ 0.2 % compared to 2010)
Pharmaceutical exports: 50.4 billion Euro (- 1.4 % compared to 2010)

Main importers:
- Belgium: 7.5 billion Euro
- Netherlands: 6.7 billion Euro
- USA: 5.7 billion Euro
- Switzerland: 3.2 billion Euro

Employees: 105,435*

Planned internal R&D-expenditures in 2011: 3.9 billion Euro (+ 5.1 % compared to 2010)

The Global Pharmaceutical Market**

Total market: 684.2 billion Euro (+ 8.4 % compared to 2010)
North America: 247.4 billion Euro (+ 3.3 % compared to 2010)
EU: 189.3 billion Euro (+ 6.5 % compared to 2010)
Asia, Africa, Australasia***: 198.6 billion Euro (+ 16.5 % compared to 2010)
Japan: 80.1 billion Euro (+ 15.9 % compared to 2010)
Latin America: 48.8 billion Euro (+ 11.7 % compared to 2010)

Pharmaceuticals in the German Health Care System

Total SHI expenditures: 179.6 billion Euro (+ 2.1 % compared to 2010)
SHI expenditures for pharmaceuticals: 28.9 billion Euro (- 3.8 % compared to 2010)
% of pharmaceuticals of total expenditures: 16.1 %

* 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 = 0.718).
*** The region “Asia, Africa, Australasia” includes the values for Japan.
The German Pharmacy Market

Total turnover in the pharmacy market (based on manufacturer price): 26.2 billion Euro (+ 2.1 % compared to 2010)

Prescription-only drugs: 20.8 billion Euro (+ 1.7 %)
Pharmacy-only drugs: 2.9 billion Euro (+ 2.8 %)

Top 10 leading indications (ATC-3) in the SHI market 2011 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>32,146.6</td>
<td>0.70</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>L04B Anti-TNF preparations</td>
<td>1,244.9</td>
<td>13.40</td>
<td>3.87</td>
<td>0.05</td>
</tr>
<tr>
<td>A10C human insulin and analogs</td>
<td>1,216.0</td>
<td>1.87</td>
<td>3.78</td>
<td>1.75</td>
</tr>
<tr>
<td>N05A antipsychotics</td>
<td>1,187.9</td>
<td>3.36</td>
<td>3.70</td>
<td>1.78</td>
</tr>
<tr>
<td>N02A analgesics, narcotics</td>
<td>951.4</td>
<td>2.85</td>
<td>2.96</td>
<td>0.96</td>
</tr>
<tr>
<td>T02D diabetes tests</td>
<td>902.9</td>
<td>0.68</td>
<td>2.81</td>
<td>3.50</td>
</tr>
<tr>
<td>N03A antiepileptics</td>
<td>869.0</td>
<td>6.08</td>
<td>2.70</td>
<td>1.39</td>
</tr>
<tr>
<td>C09D angiotensin-II antagonists, combinations</td>
<td>819.2</td>
<td>4.65</td>
<td>2.55</td>
<td>1.22</td>
</tr>
<tr>
<td>L03B interferons</td>
<td>813.8</td>
<td>2.33</td>
<td>2.53</td>
<td>0.05</td>
</tr>
<tr>
<td>L01X other antineoplastic agents</td>
<td>813.1</td>
<td>4.45</td>
<td>2.53</td>
<td>0.08</td>
</tr>
<tr>
<td>A02B ulcer treatments</td>
<td>806.3</td>
<td>-12.15</td>
<td>2.51</td>
<td>4.27</td>
</tr>
</tbody>
</table>

Source: Illustration of the BPI based on data of Insight Health 2012.

Pharmaceutical Drug Prices

Development of drug prices in SHI system: - 2.2 % (compared to 2010)

Number of Pharmaceutical Drugs

“ROTE LISTE®” 2011 includes: 7,428 preparation listings

The numbers summarized here are in reference to the year 2011, unless otherwise specified. Sources for the data and more in-depth information can be found in the “Pharma-Data 2012” booklet.