

# BALTIC STATES PHARMA MARKET OVERVIEW

Secondary sales analysis



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Volume – measure of sales quantity;

Value – wholesales amount in Euros;

CAGR – Compound Annual Growth Rate refers to the year-over-year average growth rate of an measured event over a specified period of time;

YoY – Year-over-year comparison method of evaluating two or more measured events to compare the results at one time period with those from another time period (or series of time periods), on an annualized basis;

YTD – year to date refers to measured event characteristics in time period beginning of January 1<sup>st</sup> to today's date or specified date;

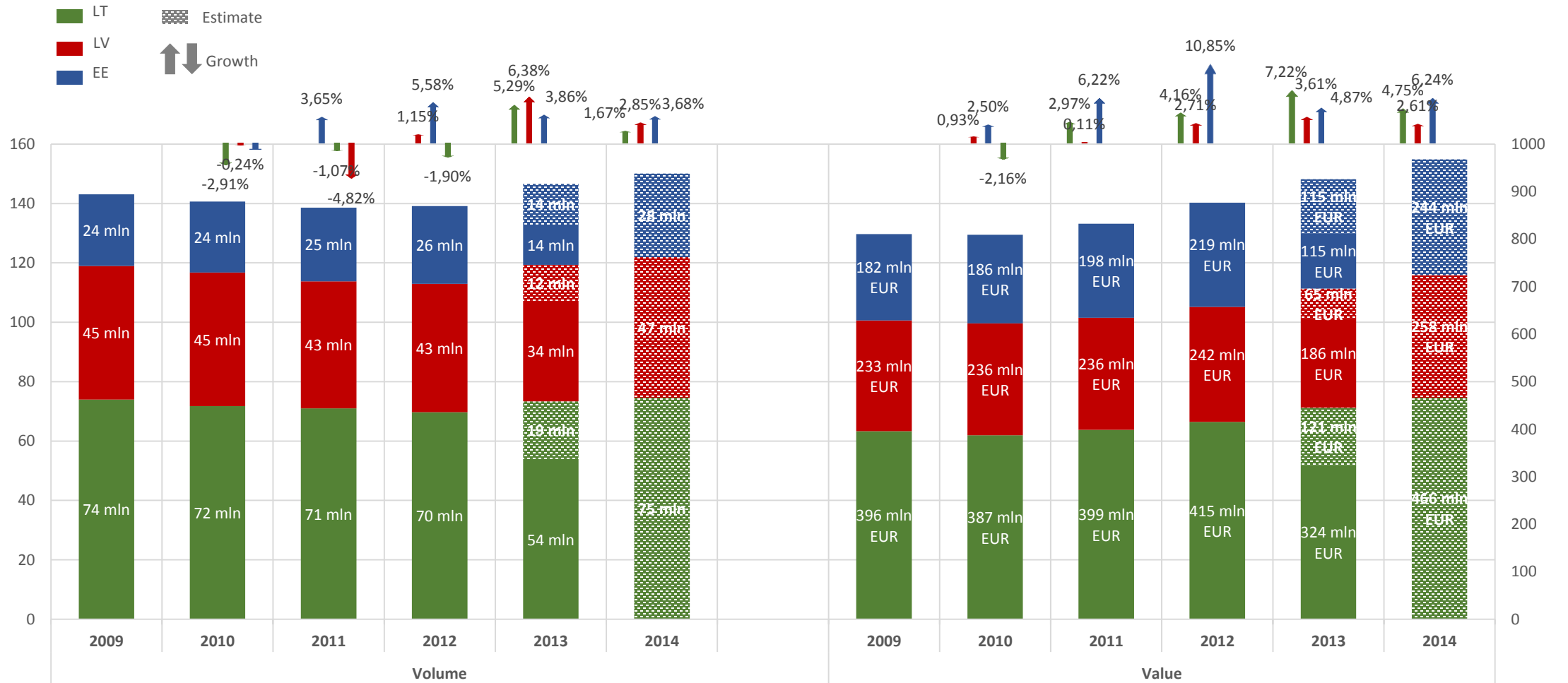
MS – market share.

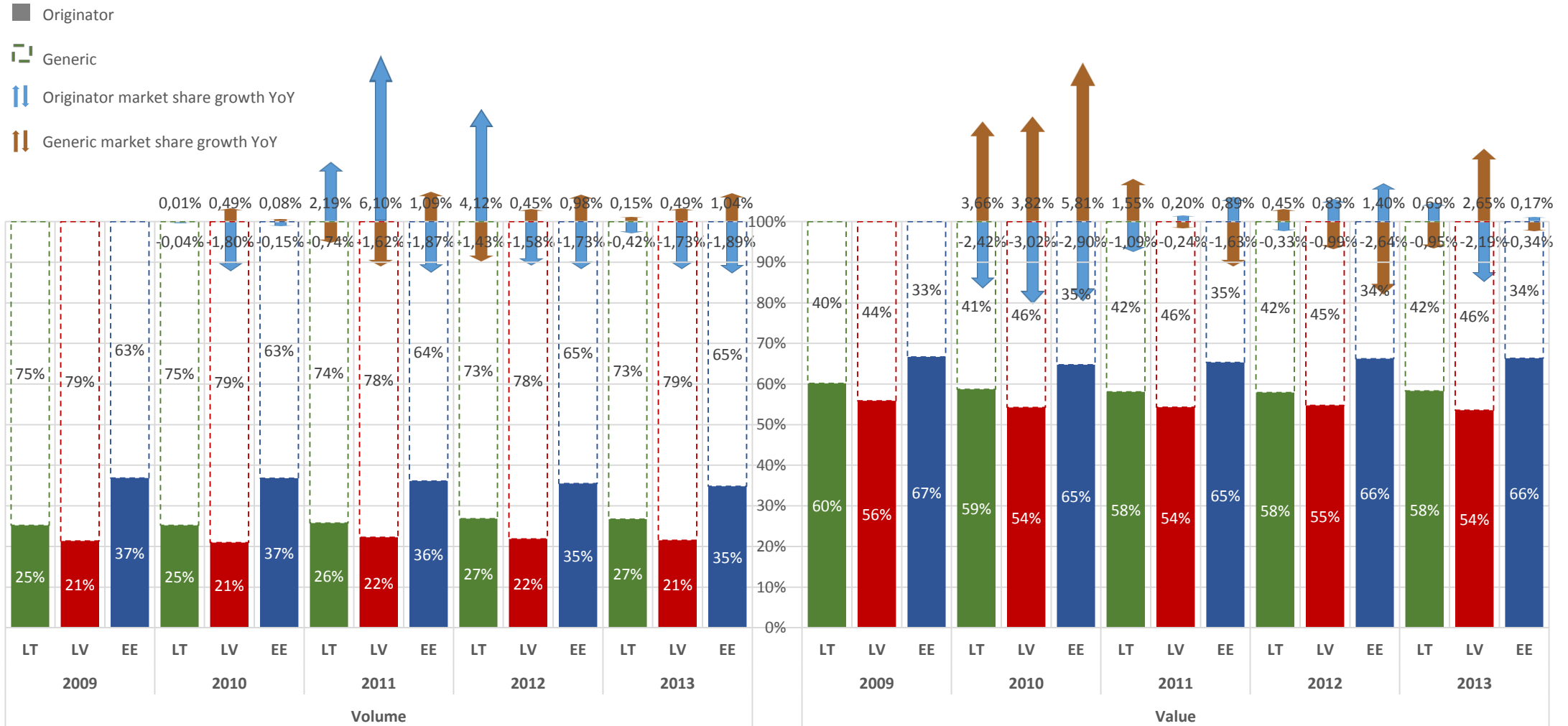
The following analysis are based on Lithuania, Latvia and Estonia pharmaceutical market secondary sales (wholesales) data collected by PharmaZOOM project developed by SoftDent.

Analysis period includes:

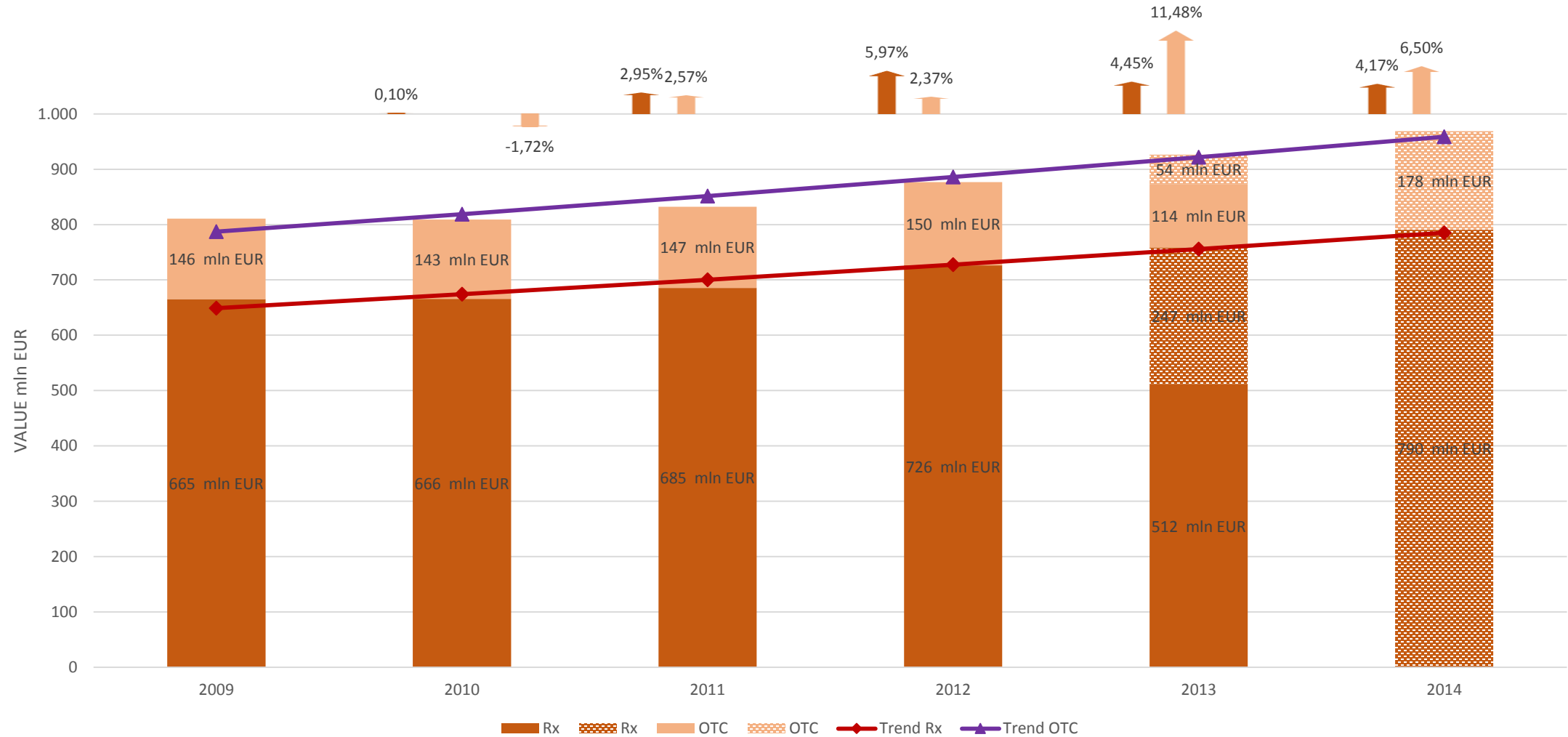
- 2009 – 2013 3Q in Latvia and Lithuania
- 2009 – 2013 2Q in Estonia

Type of medicines are restricted to OTC and Rx (Food supplements and medicine supplies are not included).



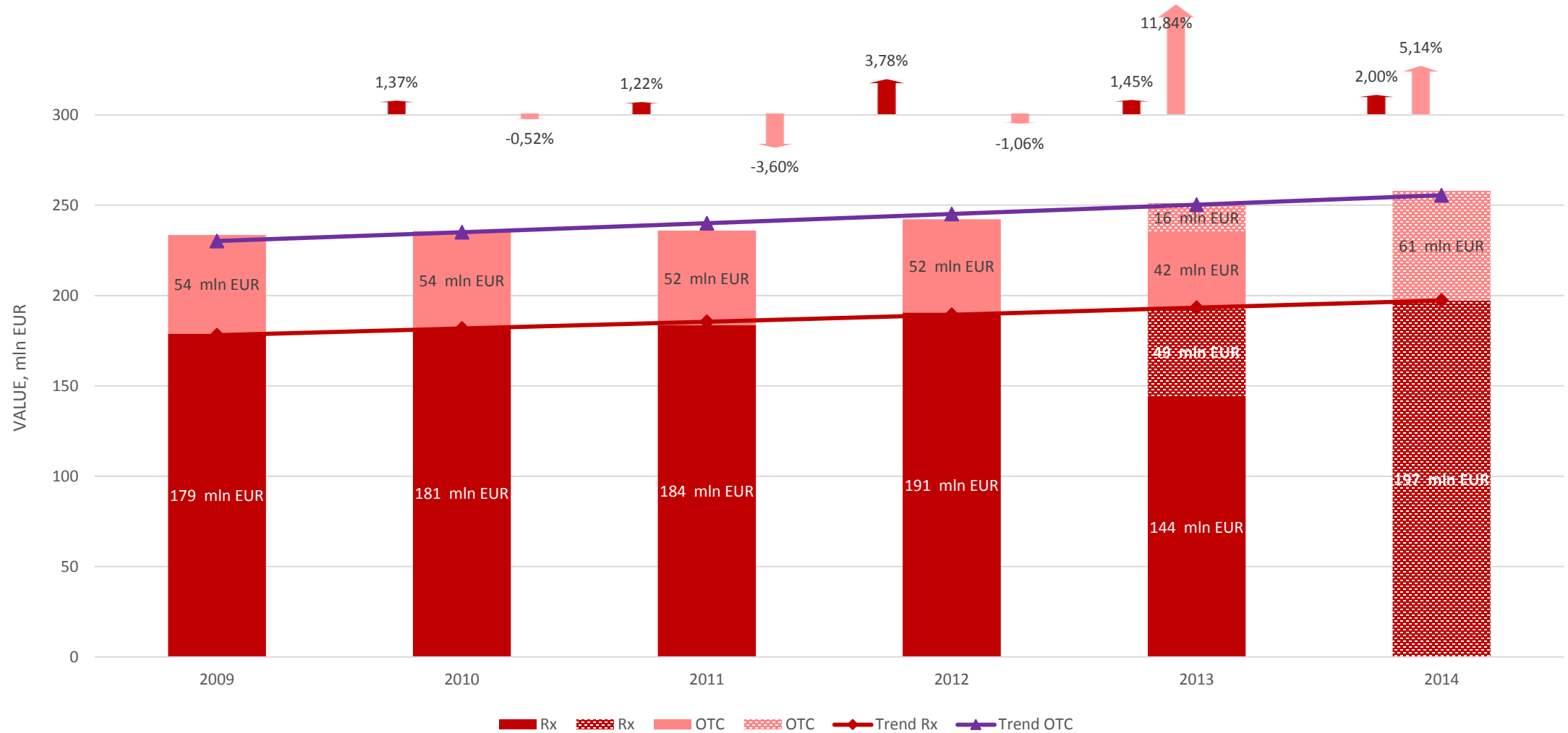


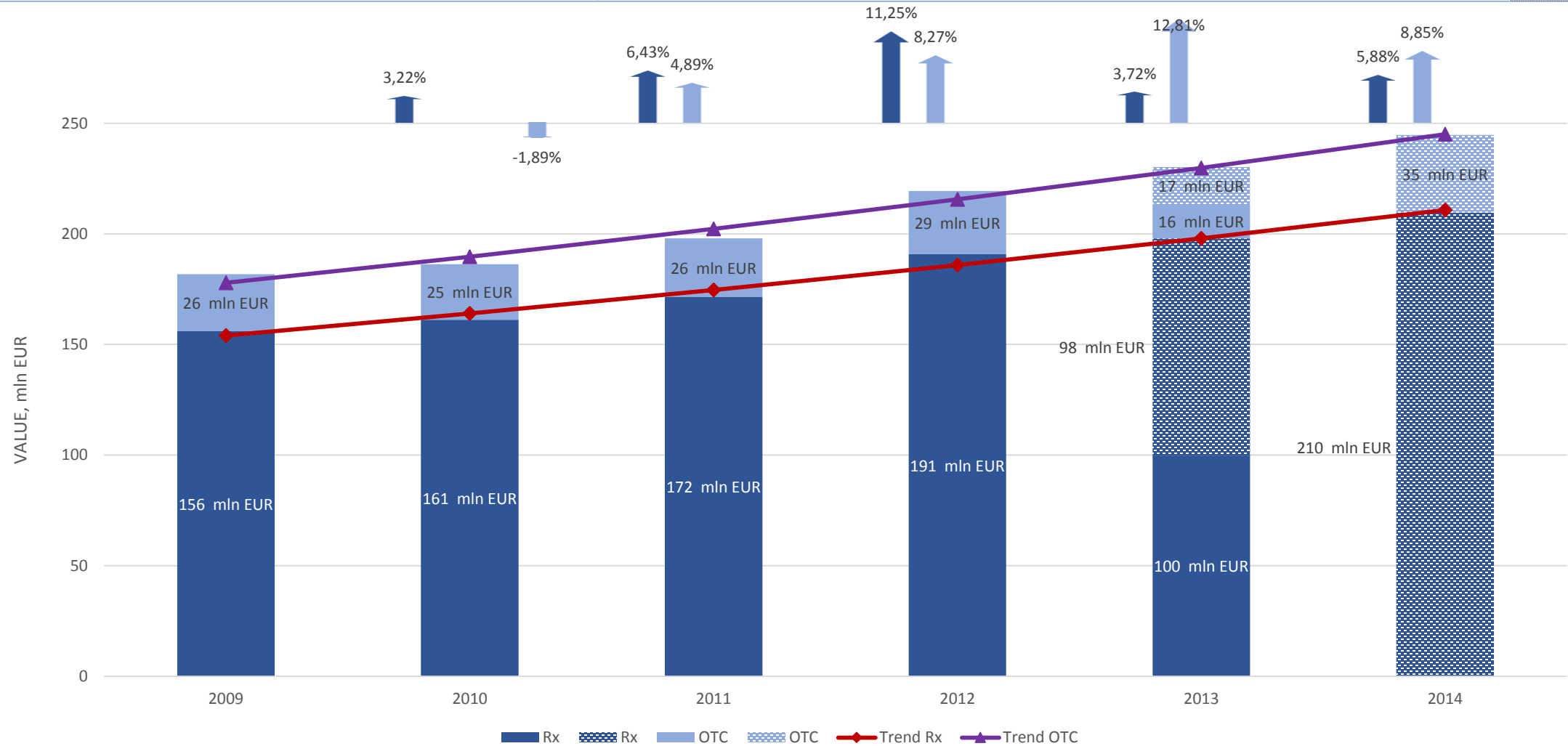
# Rx and OTC dispensing types drugs market in Baltic states 2009 - 2014



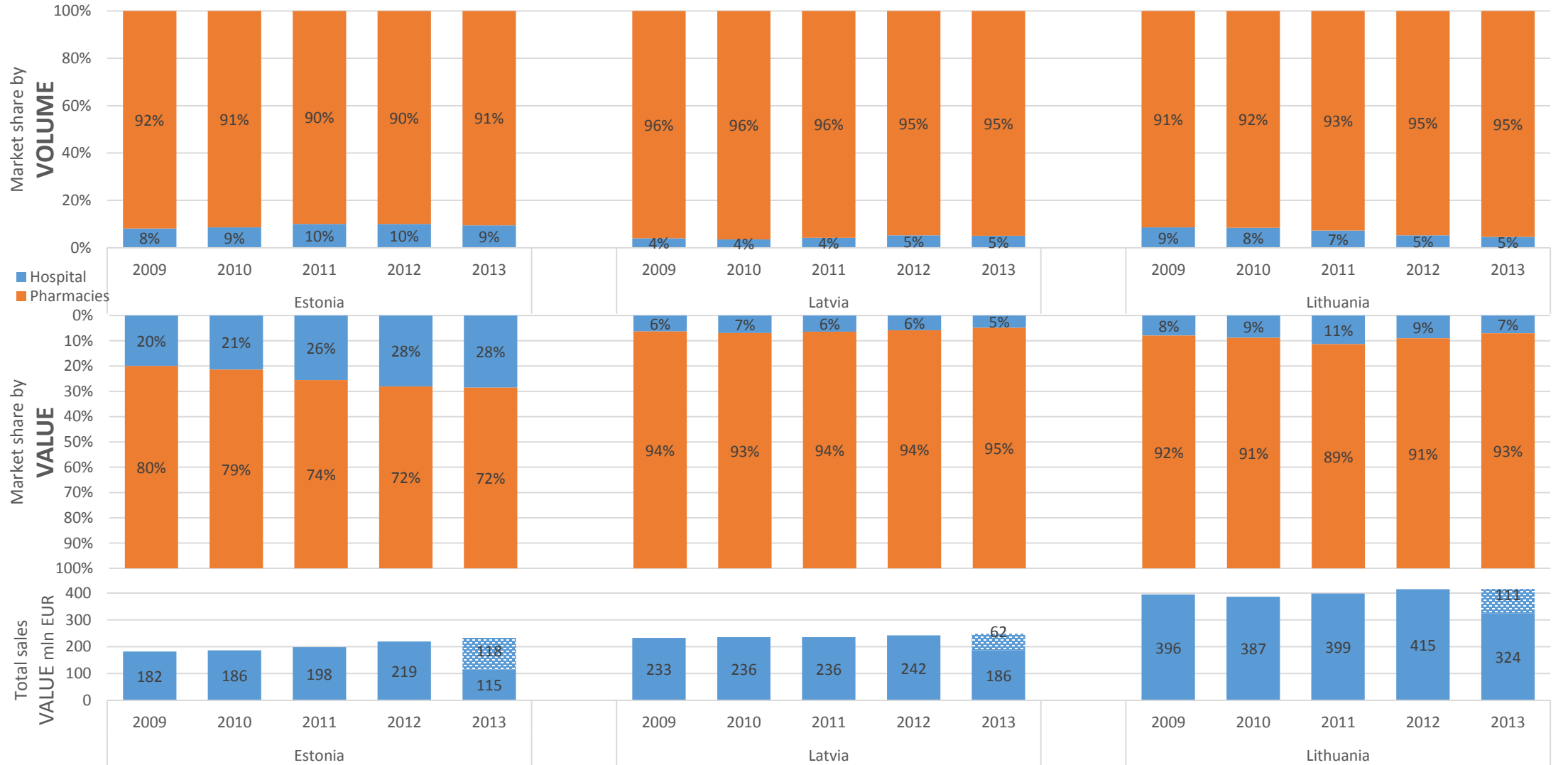








## Hospitals and pharmacies segments market share



Source: PharmaZOOM;  
Period: LT, LV 2009 1Q – 2013 3Q; EE 2009 1Q–2013 2Q;

# General overview

# Hospital segment Generic/Originator medicine market share



Source: PharmaZOOM;  
Period: LT, LV 2009 1Q – 2013 3Q; EE 2009 1Q–2013 2Q;

# General overview

## Pharmacy segment Generic/Originator medicine market share



Source: PharmaZOOM;  
Period: LT, LV 2009 1Q – 2013 3Q; EE 2009 1Q–2013 2Q;



	Rank 2013 (2012)	Corporation	Sales, k € 2012	Sales, k € 2013 1Q-3Q	Growth YoY 2013 1Q-3Q	CAGR 2010-2012	Market share (value) 2012	Market share (value) 2013
<b>HOSPITAL PRODUCERS</b>	1 (4)	Fresenius	2.542	1.966	5,71%	6,23%	7,37%	8,64%
	2 (1)	Valeant	3.852	1.846	-43,58%	65,37%	12,96%	8,11%
	3 (6)	Takeda	1.676	1.371	10,78%	21,81%	4,90%	6,02%
	4 (10)	Johnson & Johnson	1.340	1.208	1063,53%	12,59%	0,41%	5,31%
	5 (3)	Abbott	2.871	1.138	1,06%	11,26%	4,46%	5,00%
	6 (8)	GlaxoSmithKline	1.398	1.093	5,72%	-2,31%	4,10%	4,80%
	7 (12)	Octapharma	1.224	1.086	15,69%	187,00%	3,72%	4,77%
	8 (11)	Sandoz	1.256	1.046	9,75%	-12,32%	3,77%	4,59%
	9 (5)	Bayer	2.043	970	-40,28%	5,62%	6,43%	4,26%
	10 (7)	Genzyme	1.500	959	-18,28%	-0,74%	4,65%	4,21%
		TOP 1-10	19.702	12.683	-4,80%	17,69%	52,78%	55,70%
		TOP 11-20	10.655	5.508	-15,67%	5,89%	25,87%	24,19%
		Other	7.225	4.579	-15,03%	-11,60%	21,35%	20,11%
		Total	37.581	22.770	-9,79%	4,98%	100,00%	100,00%
<b>PHARMACY PRODUCERS</b>	1 (1)	Berlin Chemie	28.305	22.040	5,93%	-2,20%	7,52%	7,32%
	2 (2)	Servier	24.488	18.854	3,16%	7,44%	6,60%	6,27%
	3 (6)	Pfizer	18.439	16.491	28,81%	-1,17%	4,63%	5,48%
	4 (5)	GlaxoSmithKline	19.384	16.092	13,06%	-6,37%	5,14%	5,35%
	5 (3)	Sanofi-Aventis	20.714	15.009	-3,13%	-2,97%	5,60%	4,99%
	6 (4)	KRKA	20.583	14.174	-6,60%	11,73%	5,48%	4,71%
	7 (10)	Novartis	12.395	13.628	72,95%	23,83%	2,85%	4,53%
	8 (9)	Teva	14.475	11.893	12,29%	-1,88%	3,83%	3,95%
	9 (8)	Sandoz	14.606	11.819	10,39%	6,30%	3,87%	3,93%
	10 (7)	AstraZeneca	14.656	11.243	4,30%	0,57%	3,90%	3,74%
		TOP 1-10	188.044	151.242	10,60%	-0,08%	49,42%	50,26%
		TOP 11-20	84.667	69.459	10,92%	0,55%	22,63%	23,08%
		Other	104.782	80.228	3,73%	4,33%	27,95%	26,66%
		Total	377.493	300.928	8,76%	3,42%	100,00%	100,00%



	Rank 2013 (2012)	Corporation	Sales, k € 2012	Sales, k € 2013 1Q-3Q	Growth YoY 2013 1Q-3Q	CAGR 2010-2012	Market share (value) 2012	Market share (value) 2013
<b>HOSPITAL PRODUCERS</b>	1 (1)	Takeda	1.856	1.437	8,99%	-16,22%	12,13%	15,82%
	2 (7)	Fresenius Kabi	674	583	28,04%	64,94%	4,18%	6,41%
	3 (2)	Pfizer	1.132	578	-36,91%	0,10%	8,43%	6,36%
	4 (4)	Sanofi-Aventis	839	571	-14,05%	-1,32%	6,11%	6,29%
	5 (3)	Teva	1.001	529	-29,52%	26,26%	6,90%	5,83%
	6 (6)	Sopharma	724	467	-11,86%	11,66%	4,87%	5,14%
	7 (9)	Abbott	547	442	6,94%	-21,94%	3,80%	4,86%
	8 (8)	Medochemie	548	384	-3,26%	-0,74%	3,65%	4,23%
	9 (20)	mn pharmaceuticals	227	275	63,03%	142,78%	1,55%	3,03%
	10 (16)	Boehringer Ingelheim	307	265	33,03%	-9,79%	1,83%	2,91%
		TOP 1-10	7.855	5.530	-4,85%	4,34%	53,46%	60,90%
		TOP 11-20	2.925	2.018	-8,22%	8,89%	20,22%	22,22%
		Other	3.472	1.534	-46,39%	-14,77%	26,31%	16,89%
		Total	14.252	9.081	-16,46%	-6,57%	100,00%	100,00%
<b>PHARMACY PRODUCERS</b>	1 (2)	Servier	11.803	9.012	-0,16%	8,42%	5,34%	5,08%
	2 (3)	Sanofi-Aventis	11.484	8.865	3,68%	-2,92%	5,06%	5,00%
	3 (6)	Novartis	9.814	8.115	11,66%	12,07%	4,30%	4,57%
	4 (1)	Pfizer	11.956	8.078	-12,09%	-0,68%	5,43%	4,55%
	5 (5)	Teva	9.977	7.505	2,93%	6,22%	4,31%	4,23%
	6 (8)	Merck Sharp & Dohme	8.565	7.475	20,79%	6,33%	3,66%	4,21%
	7 (4)	Hoffmann-La Roche	11.293	7.340	-16,91%	34,33%	5,23%	4,14%
	8 (7)	GlaxoSmithKline	9.745	7.237	-0,83%	-6,05%	4,32%	4,08%
	9 (9)	Berlin Chemie	8.253	6.583	7,90%	-8,84%	3,61%	3,71%
	10 (10)	KRKA	7.564	6.160	11,11%	7,02%	3,28%	3,47%
		TOP 1-10	100.454	76.372	1,43%	1,62%	44,53%	43,05%
		TOP 11-20	59.921	47.502	7,78%	3,26%	26,07%	26,78%
		Other	67.636	53.514	7,66%	-0,42%	29,40%	30,17%
		Total	228.010	177.389	4,92%	1,97%	100,00%	100,00%



	Rank 2013 (2012)	Corporation	Sales, k € 2012	Sales, k € 2013 1Q-3Q	Growth YoY 2013 1Q-3Q	CAGR 2010-2012	Market share (value) 2012	Market share (value) 2013
<b>HOSPITAL PRODUCERS</b>	1 (1)	Hoffmann-La Roche	11.577	6.128	3,41%	20,34%	18,95%	18,65%
	2 (2)	Abbott	5.344	2.922	5,16%	55,21%	8,89%	8,89%
	3 (4)	Johnson & Johnson UAB	4.002	2.528	19,96%	63,23%	6,74%	7,69%
	4 (3)	ViiV Healthcare UK Limited	4.549	1.628	-28,75%	2898,21%	7,31%	4,95%
	5 (6)	Pfizer	3.016	1.592	4,12%	1,47%	4,89%	4,84%
	6 (5)	Octapharma (IP) Limited	3.096	1.543	23,94%	38,27%	3,98%	4,70%
	7 (7)	GE Healthcare AS	2.478	1.365	8,46%	23,04%	4,02%	4,15%
	8 (8)	Merck Sharp & Dohme	2.154	1.032	0,85%	23,61%	3,27%	3,14%
	9 (12)	Baxter AG	1.374	970	47,80%	-2,49%	2,10%	2,95%
	10 (14)	Genzyme Corp.	1.354	945	34,87%	28,87%	2,24%	2,87%
		TOP 1-10	38.945	20.652	5,86%	27,19%	62,39%	62,85%
		TOP 11-20	11.697	5.963	-5,55%	5,17%	20,19%	18,15%
		Other	10.893	6.246	14,68%	13,79%	17,42%	19,01%
		Total	61.535	32.861	5,09%	24,22%	100,00%	100,00%
<b>PHARMACY PRODUCERS</b>	1 (1)	AstraZeneca AB	9.720	5.204	7,83%	-8,24%	6,13%	6,30%
	2 (2)	GlaxoSmithKline	9.449	5.171	11,06%	0,55%	5,91%	6,27%
	3 (3)	Sandoz d.d.	9.053	4.529	-0,99%	4,49%	5,81%	5,49%
	4 (4)	Teva	9.024	4.462	0,17%	11,45%	5,66%	5,41%
	5 (7)	Takeda	7.938	4.273	9,44%	5,53%	4,96%	5,18%
	6 (5)	Merck Sharp & Dohme	8.370	4.188	-1,45%	-1,13%	5,39%	5,07%
	7 (6)	Novartis Pharma	8.144	4.142	-0,31%	8,34%	5,27%	5,02%
	8 (8)	Sanofi Aventis	7.828	3.997	3,49%	-2,74%	4,90%	4,84%
	9 (10)	Berlin-Chemie AG (Menarini Group)	6.381	3.434	11,07%	2,79%	3,92%	4,16%
	10 (11)	Bayer	6.152	3.429	15,07%	10,78%	3,78%	4,15%
		TOP 1-10	82.059	42.828	5,09%	1,11%	51,74%	51,89%
		TOP 11-20	41.029	20.959	1,84%	4,24%	26,13%	25,39%
		Other	34.783	18.746	7,50%	5,26%	22,14%	22,71%
		Total	157.872	82.533	4,77%	3,82%	100,00%	100,00%





	RANK 2013 (2012)	ATC	Sales, k € 2013 1Q-3Q	Growth YoY 2013 1Q-3Q	Market share by value 2013 1Q-3Q	Products TOP 3	Product Sales, k € 2013 1Q-3Q	Product Growth 2013 YoY 2013 1Q-3Q
HOSPITAL ATC CATEGORIES	1 (1)	V08A	1916	-16,24%	8,42%	Omnipaque	772	-12,96%
						Ultravist	732	-37,85%
						Visipaque	398	112,33%
	2 (2)	J05A	1517	-21,02%	6,66%	Reyataz	668	-25,32%
						Baraclude	91	-41,44%
						Kaletra caps.	202	-45,05%
	3 (3)	B01A	1207	-11,81%	5,30%	Clexane	104	-62,41%
						Zibor	158	33,40%
						Fraxiparine	551	16,99%
	4 (7)	J01D	1183	5,80%	5,20%	Axetine	145	-22,49%
						Reflin	127	-26,41%
						Zepilen	196	18,34%
	5 (5)	B05X	1176	-4,88%	5,16%	Natrio chloridas Fresenius	842	-0,52%
						Sodium Chloride Braun	90	-42,44%
						Magnio sulfatas Sanitas	114	7,55%
PHARMACY ATC CATEGORIES	1 (2)	M01A	12867	12,93%	4,28%	Arcoxia	948	71,45%
						Nimesil	1580	13,46%
						Ibumetin Nycomed	1163	17,97%
	2 (1)	L03A	11673	-2,36%	3,88%	Pegasys	2056	15,39%
						Copaxone	1703	-11,48%
						Rebif	2505	-4,62%
	3 (3)	R03A	11250	2,06%	3,74%	Symbicort	4644	6,95%
						Seretide	4564	-2,62%
						Berodual	595	-11,89%
	4 (5)	A10A	10412	4,89%	3,46%	Lantus SoloStar	1820	14,46%
						NovoMix	2725	-0,69%
						Humalog Mix	2104	5,01%
	5 (4)	C09B	10307	1,43%	3,43%	Presteram	2684	9,81%
						Noliterax	1727	11,60%
						Noliprel	1726	-11,28%



	RANK 2013 (2012)	ATC	Sales, k € 2013 1Q-3Q	Growth YoY 2013 1Q-3Q	Market share by value 2013 1Q-3Q	Products TOP 3	Product Sales, k € 2013 1Q-3Q	Product Growth 2013 YoY 2013 1Q-3Q
HOSPITAL ATC CATEGORIES	1 (3)	V08A	1235	15,44%	12,59%	Omnipaque	412	-10,03%
						Visipaque	768	28,39%
						Iopamigita	42	655,36%
	2 (2)	B01A	1033	-14,58%	10,53%	Clexane	232	-26,28%
						Fraxiparine	131	-15,84%
						Fragmin	169	-29,74%
	3 (1)	G03A	727	-39,99%	7,41%	Evra	196	-39,65%
						Yarina	177	-40,78%
						Yasminelle	354	-39,78%
	4 (4)	J01D	608	-6,09%	6,19%	Axetine	170	-0,58%
Ceftriaxone-BCP						117	140,56%	
Cefazolin-BCPP						79	-29,25%	
Pamecil						57	0,03%	
5 (7)	J01C	466	3,87%	4,75%	Tazocin	97	16,37%	
					Ampisid	275	63,03%	
					Neulasta	2032	1,23%	
					Rebif 44	1475	17,33%	
					Avonex	1219	0,24%	
PHARMACY ATC CATEGORIES	2 (2)	M01A	7125	10,07%	4,02%	Ibuprofen	1749	11,67%
						Nimesil	364	2,00%
						Dicloberl	333	3,94%
						Presteram	1531	-7,96%
	3 (4)	C09B	5987	0,29%	3,38%	Noliprel Forte	692	2,33%
						Noliterax	768	17,56%
						Janumet	1118	13,57%
						Metforal	495	-11,97%
4 (6)	A10B	5835	15,22%	3,29%	Competact	599	-27,20%	
					Novorapid	1111	0,90%	
					Novomix	763	-23,43%	
5 (5)	A10A	5763	-2,82%	3,25%	Lantus	1137	24,02%	



	RANK 2013 (2012)	ATC	Sales, k € 2013 1Q-2Q	Growth YoY 2013 1Q-2Q	Market share by value 2013 1Q-2Q	Products TOP 3	Product Sales, k € 2013 1Q-2Q	Product Growth 2013 YoY 2013 1Q-2Q
HOSPITAL ATC CATEGORIES	1 (1)	L04A	1455	14,18%	13,49%	Enbrel	952	5,12%
						Orencia	42	161,54%
						Simponi	425	37,77%
	2 (2)	V08A	1252	9,98%	11,61%	Omnipaque	204	56,52%
						Ultravist	142	-8,96%
						Visipaque	907	6,51%
	3 (5)	J05A	689	48,33%	6,39%	Norvir	134	17,29%
						Prezista	503	53,65%
						Ziagen	10	-3,20%
	4 (6)	L01X	570	40,77%	5,28%	Avastin	319	4,19%
						Iressa	92	219,27%
						Topotecan Teva	47	64,28%
	5 (7)	B01A	389	-2,75%	3,61%	Arixtra	16	-34,51%
						Clexane	293	-3,45%
						Zibor	34	-4,49%
PHARMACY ATC CATEGORIES	1 (1)	A10A	4314	-1,41%	5,33%	Levemir Flexpen	1127	-1,86%
						Novorapid Flexpen	896	1,69%
						Lantus Solostar	1301	0,89%
	2 (2)	M01A	3799	17,59%	4,69%	Ibumetin	925	50,77%
						Arcoxia	445	15,55%
						Glucadol	271	-12,27%
	3 (3)	R03A	3261	11,40%	4,03%	Seretide Diskus	1106	4,50%
						Symbicort Turbuhaler	1258	19,38%
						Seretide Inhaler	188	13,88%
	4 (4)	L03A	2897	2,46%	3,58%	Pegasys	696	-6,67%
						Rebif 44 Mcg	366	0,00%
						Copaxone	810	10,71%
	5 (6)	L01X	2686	13,89%	3,32%	Nexavar	433	58,95%
						Glivec	877	9,66%
						Sutent	516	-27,04%

**In case you have any questions, please contact persons provided below.**

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**Thank you in advance for your feedback, comments or suggestions.**