



Making Medicines Affordable

Total Global Medicines Market

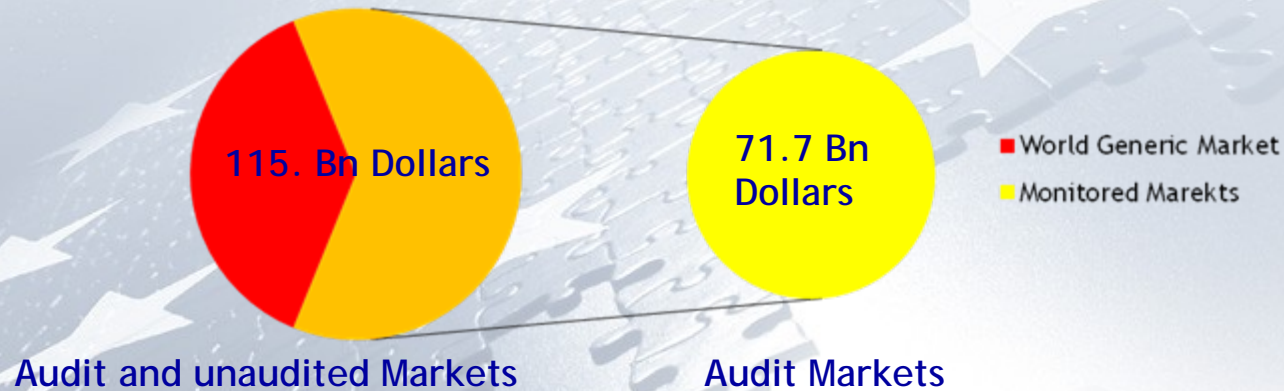
Audited Global Pharmaceutical Sales and Market Growth
(at ex-man level)



Source: IMS Health, Market Prognosis March 2008 Preview in const.US\$. Pharmerging Markets = Brazil, Russia, India, China, Mexico, Korea, Turkey

The Global Pharmaceutical Market in 2007 was \$723bn

Total Global Generic Medicines Market



Source: IMS Health

The total IMS monitored generic medicines market in 2007 represented \$71.7bn



Total European Medicines Market

Pharmaceutical Sales in Europe 2000-2005

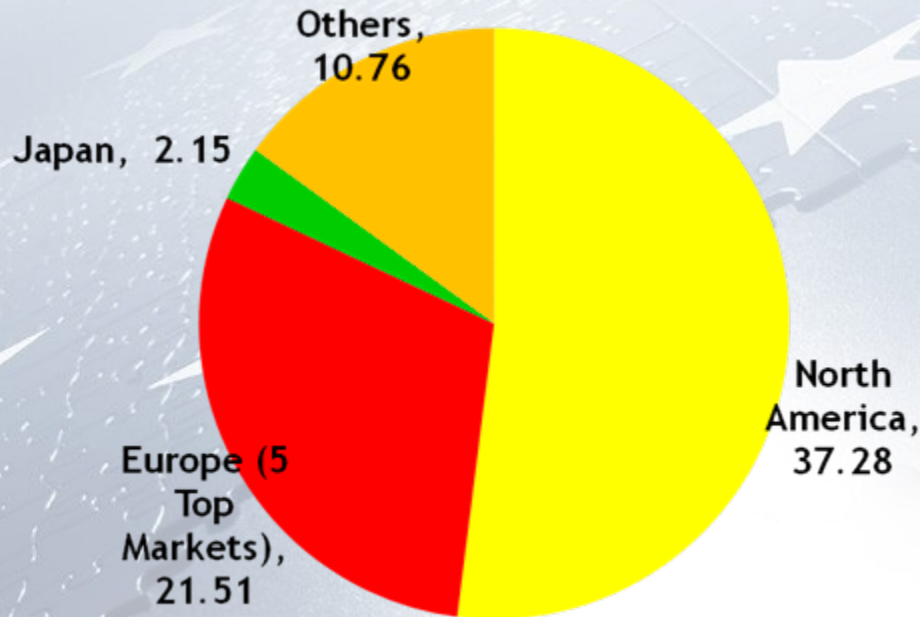


Source: IMS Health Global Pharmaceutical Report 2005

More than 125% growth in European pharmaceutical sales from 2000 to 2005.

The European medicines market in 2005-2006 was \$169.7bn

Top 5 European Generic Medicines Markets

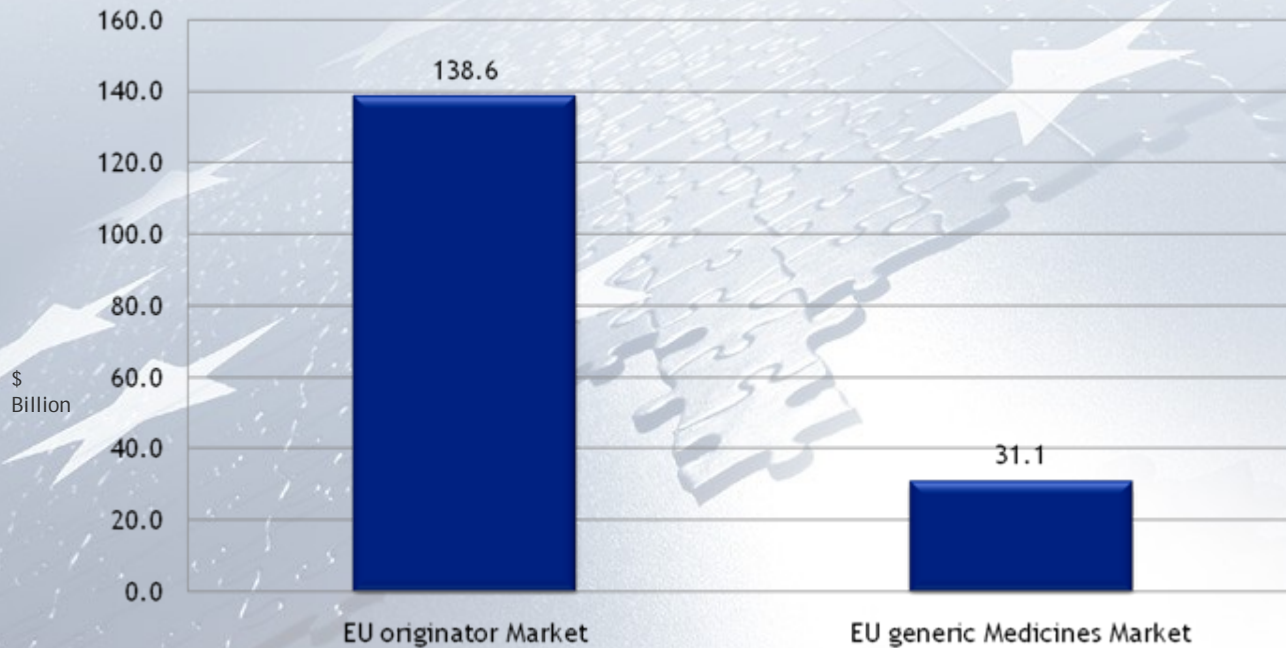


Source: IMS Health

The Top 5 European markets represented \$21.5bn
(Germany, UK, France, Italy, Spain)

European Generic Medicines Market

EU Pharmaceutical Market Breakdown



Source:
EGA Market Review 2007

The EU Generic Medicines Market
2005-2006 — \$31bn