

Anteil der Generika im Apothekenmarkt

in Prozent

Jahr	Packungen	Umsatz
2002	44,4 %	24,0 %
2003	45,6 %	24,5 %
2004	45,3 %	25,3 %
2005	45,9 %	25,4 %
2006	46,6 %	24,6 %
2007	48,7 %	23,0 %

Quelle: InsightHealth, VFA

Generikaanbieter im Markt

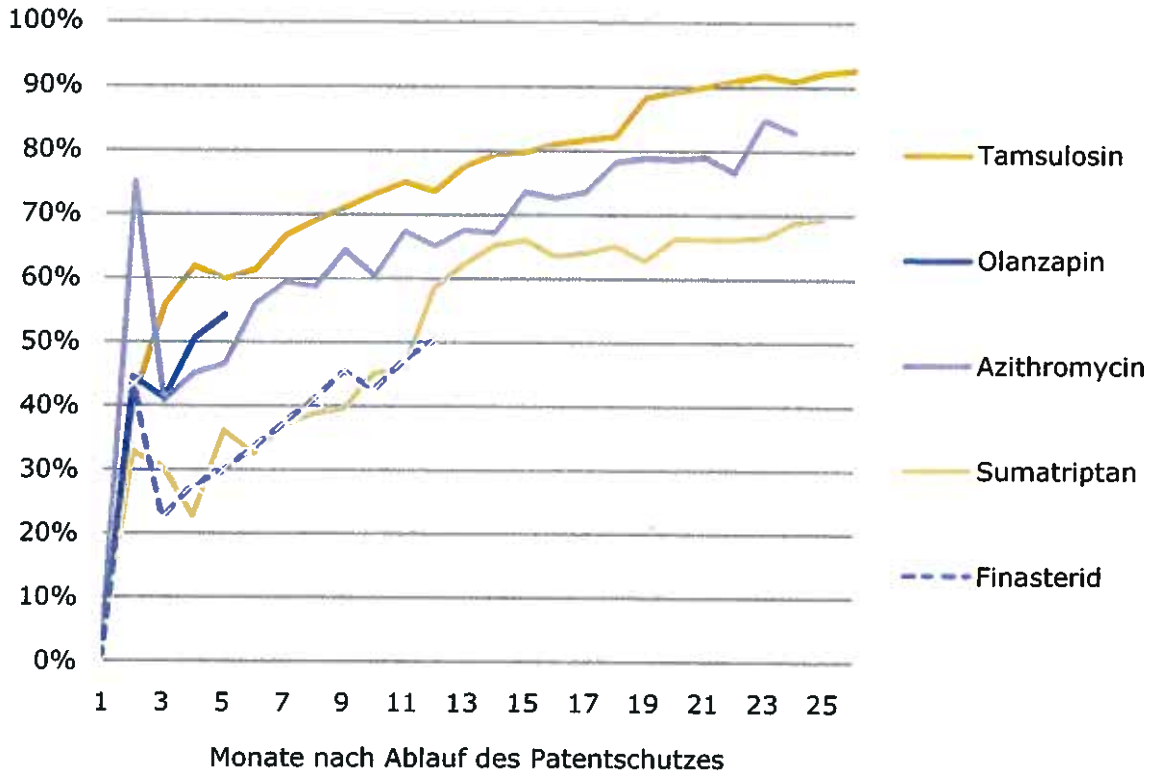
	Monat des Patentablaufs	Anzahl der Anbieter		
		unmittelbar nach Patentablauf	nach 1 Jahr	aktuell
Olanzapin	Nov 2007	5	n/a	15
Sumatriptan	Mrz 2006	2	17	18
Tamsulosin	Feb 2006	23	25	27
Finasterid	Apr 2007	8	n/a	23
Azithromycin	Apr 2006	13	16	18

Quelle: InsightHe
VFA



Verband Forschender
Arzneimittelhersteller e.V.

Entwicklung des Generika-Marktanteils



Quelle: InsightHealth,
VFA

Anlage 4**Zur VFA Stellungnahme vom
III. Generikamarkt****Remarks on the generic market analysis**

As expected, the preliminary report has revealed that the generic competition in Germany is among the most intense in Europe. One indicator however – the average time to entry following loss of exclusivity (p. 67 f.) – shows Germany on average only with a value of 7 months time lag. This is inconsistent to the other indicators and also a contradiction to our experience in the German market.

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The entry time lag is determined by the end of data protection and the entry date of the first generic. Since we have no information about data protection we can't calculate the time lag ourselves. But we have information about the entry dates of generics. This data is provided to us by the market research firm:

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The market data of Insight Health shows in several cases significant discrepancies to the data provided by IMS Health and used in the Preliminary Report.

The differences are documented in the attached table. Considering the correct entry dates will lead to a significant reduction of the calculated average time lag.

In addition, a check-up of the market share of substances with an extremely long time lag shows that most of them have little market significance whereas substances with a high market share have short or no time lag. The reason for long time lags therefore is a lack of market attractivity for the generic providers, not a blocking strategy of the originator companies. The calculation of an un-weighted average is therefore biased. We strongly propose that the calculation of the average time lag should be weighted by value.

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Table: 1: Discrepancy between market entry time lags for generics

Molecule	Date of first generic entry		Time lag calculated	
	IMS	Insight Health	IMS	Insight
Fentanyl	2005/12	2005/08	5	1
Fluticasone	2007/03	2007/01	24	22
Pergolide	2004/08	2004/01	6	-1 (early entry)
Cefixime	2005/01	2003/07	16	-2
Buserelin	2007/10	no generic competition	92	n/a
Itraconazole	2005/11	2002/09	23	(early entry?)
Flupirtine	2006/04	1996/09	56	(early entry/ license?)
Ampicillin + Sulbactam	2004/11	2004/06	17	12
Meloxicam	2005/08	2005/08	20	3*

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Source: Insight Health, VFA

*Data protection until 2005/05 (internal data from company)
n/a = non-applicable

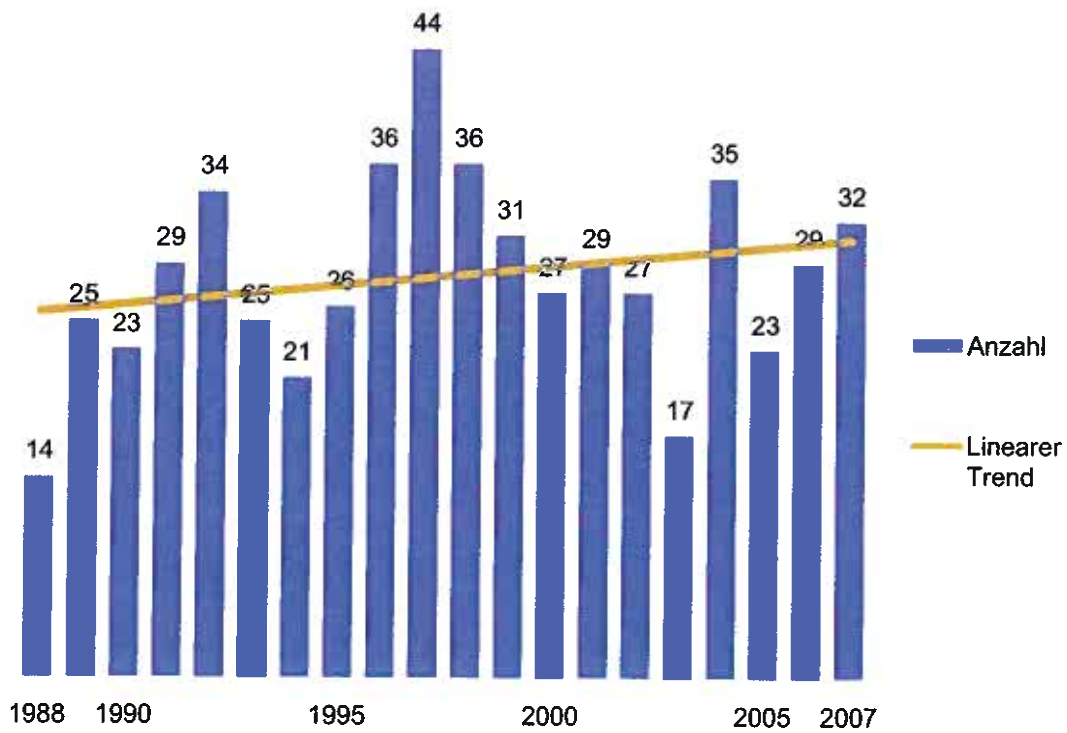
Anmeldestärkste technische Gebiete
 Technical fields with the most filings
 Domaines techniques dans lesquels le plus grand
 nombre de demandes ont été déposées

Veränderung 2006/2007
 Change 2006-2007
 Changement 2006/2007

IPC-Klassen IPC classes Classes de la CIB	2006		2007		Anzahl Number Nombre	%	
	Anzahl Number Nombre	%	Anzahl Number Nombre	%			
A 61 Medizin oder Tiermedizin; Hygiene Medical or veterinary science; hygiene Sciences médicales ou vétérinaires; hygiène	15 743	11,6	16 742	11,9	999		+6,3
H 04 Elektrische Nachrichtentechnik Electric communication technique Technique de la communication électrique	13 502	10,0	14 409	10,2	907		+6,7
G 06 Datenverarbeitung Computing Traitement des données	9 049	6,7	8 981	6,4	-68		-0,8
H 01 Elektrische Bauteile Basic electric elements Éléments électriques	8 005	5,9	8 147	5,8	142		+1,8
C 07 Organische Chemie Organic chemistry Chimie organique	7 475	5,5	7 940	5,6	465		+6,2
G 01 Messen, Prüfen Measuring; testing Métrologie et essais	7 174	5,3	7 524	5,3	350		+4,9
B 60 Fahrzeugtechnik Vehicles in general Véhicules	4 290	3,2	4 305	3,1	15		+0,3
C 12 Biochemie; Gentechnik Biochemistry; genetic engineering Biochimie; génie génétique	3 888	2,9	3 970	2,8	82		+2,1
C 08 Org. makromolekulare Verbindungen Organic macromolecular compounds Composés macromoléculaires organiques	3 718	2,7	3 835	2,7	117		+3,1
F 16 Maschinenelemente Engineering elements Éléments de technologie	3 303	2,4	3 563	2,5	260		+7,9
Zwischensumme Sub-total Total partiel	76 147	56,2	79 416	56,4	3 269		+4,3
Andere Others Autres	59 282	43,8	61 309	43,6	2 027		+3,4
Gesamt Total Total	135 429	100,0	140 725	100,0	5 296		+3,9

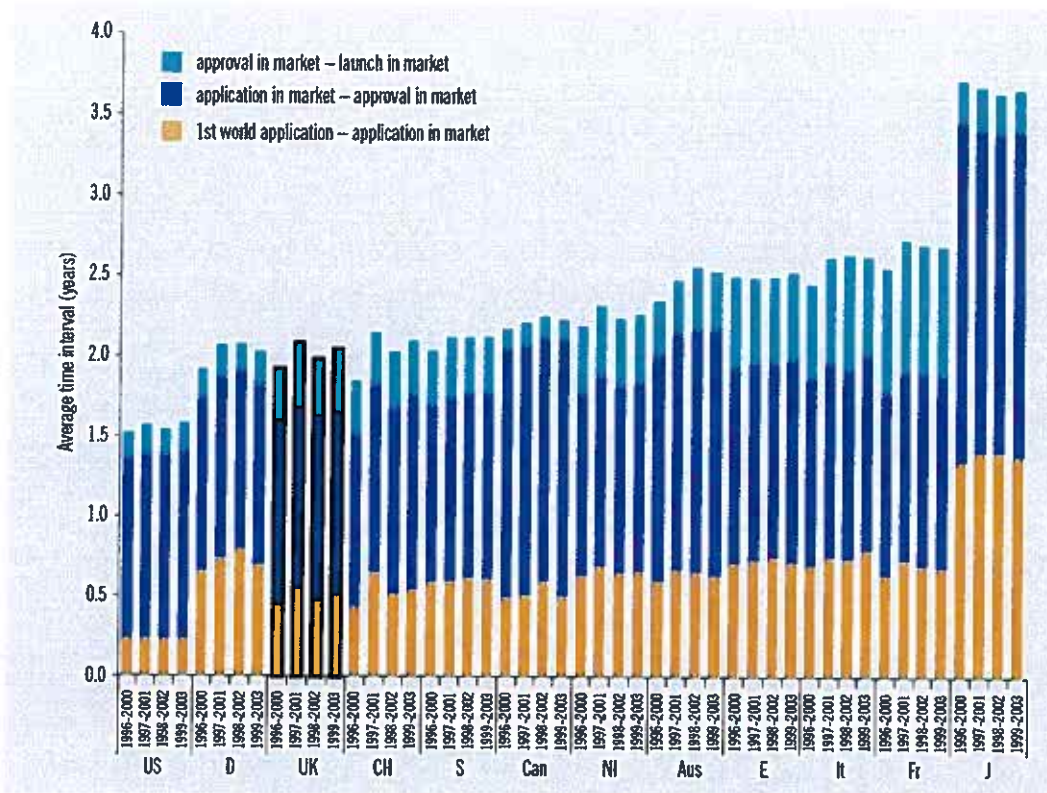
Neue Wirkstoffe in Deutschland

Anzahl



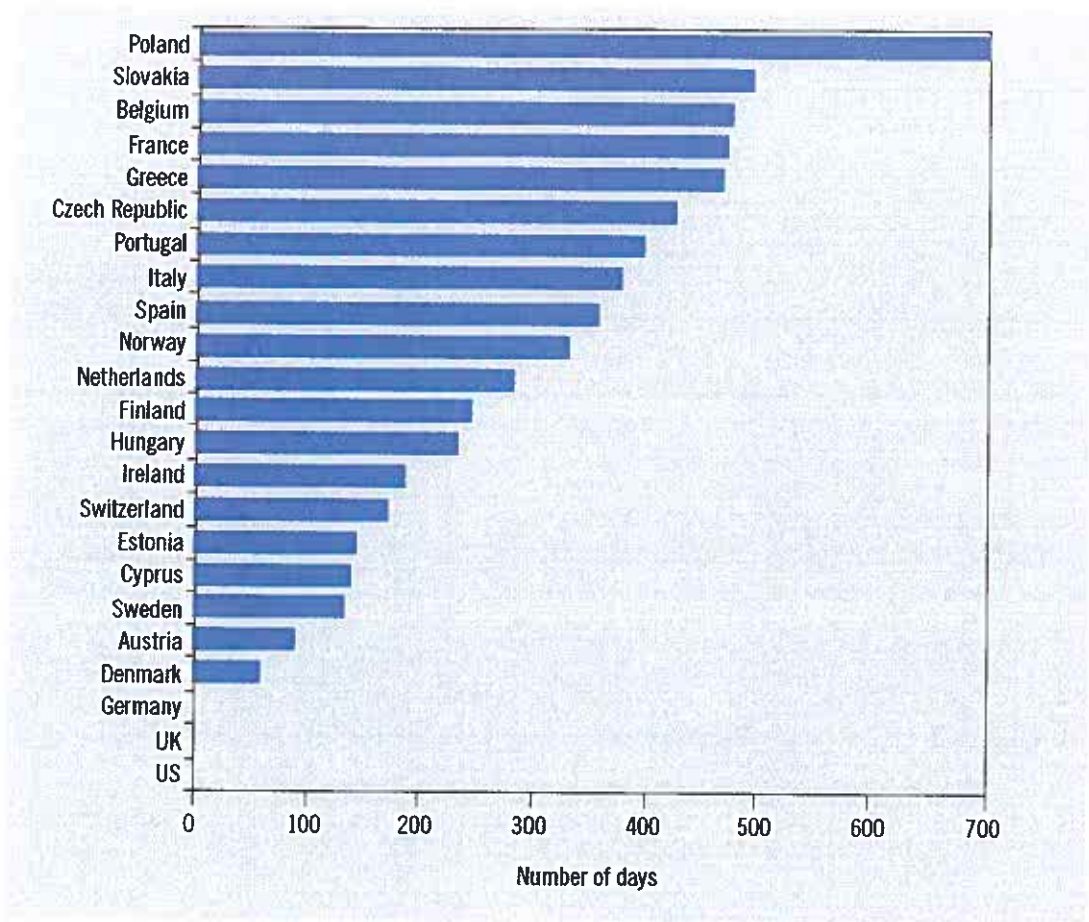
Quelle: Pharmazeutische
Zeitung, VFA

Chart: Time elapsed between first world application in any market and launch in particular market 1996-2000, 1997-2001, 1998-2002, 1999-2003



Sources: ABPI calculation, Pharmaprojects

Chart b: Average pricing and reimbursement delay for EMEA and non-EMEA approved molecules (May 2004)



Source: Efpia