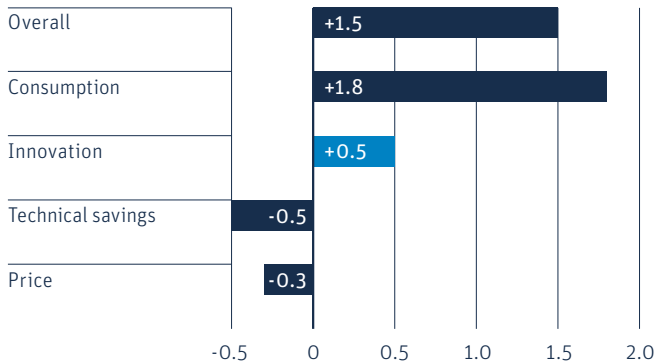


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## 2008 Sales Growth: Driven by what Components?

Change in sales in EUR billion

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Source: IGES

The EUR 1.5 billion sales increase in the SHI market in 2008 was determined by opposing components that either had a sales-increasing or decreasing effect. Consumption (increase in the prescribed daily doses) and innovative pharmaceuticals have created an additional demand of about EUR 1.8 billion and EUR 0.5 billion respectively. In contrast, “technical” savings, e.g. selection of more cost-effective drugs, including those with active ingredients whose patents expired in 2008, or larger packages, have led to almost EUR 0.53 billion in savings. Savings from further price cuts amounted to EUR 0.33 billion. As during the past three years, the dominant factor in the dynamics of the pharmaceutical market are medical and therapeutic needs.