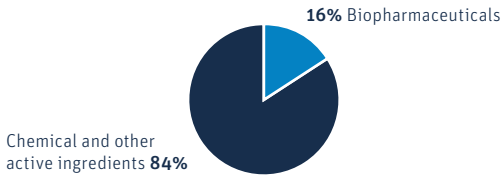
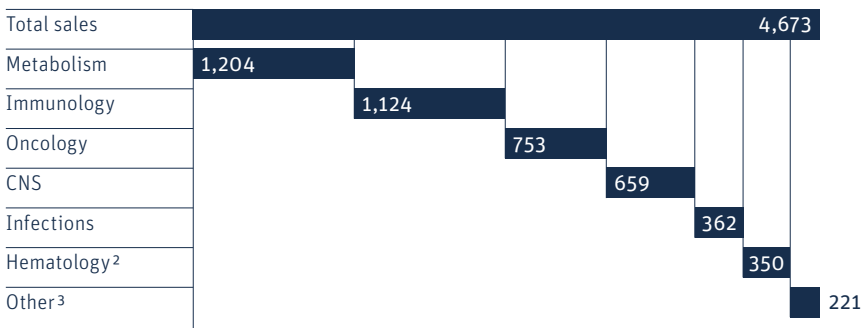


## Sales of Genetically Manufactured Pharmaceuticals

Share of biopharmaceuticals in the total German pharmaceutical market (2009)



Sales<sup>1</sup> of biopharmaceuticals in Germany in EUR million (2009)



<sup>1</sup> Total sales at pharmaceutical manufacturer prices

<sup>2</sup> Excl. hematological oncology

<sup>3</sup> Incl. gastroenterology, dermatology, urology, etc.

Source: IMS, BCG analysis

Pharmaceuticals with genetically manufactured substances (biopharmaceuticals) generated sales of EUR 4.7 billion (total sales in pharmacies and hospitals at manufacturer prices). The increase in the sales rates of biopharmaceuticals has slowed in recent years, from 12 percent in 2006 and 28 percent in 2007 to over 9 percent in 2008 and 5 percent in 2009. The proportion of biopharmaceuticals in the total pharmaceutical market remained stable in 2009 at 16 percent.

Biopharmaceuticals for treating metabolic diseases and immunological agents each make up around a quarter of biopharmaceutical sales, followed by cancer and CNS drugs, with shares of 16 percent and 14 percent respectively. Anti-infectives and hematological products each make up shares of approx. 7 percent.