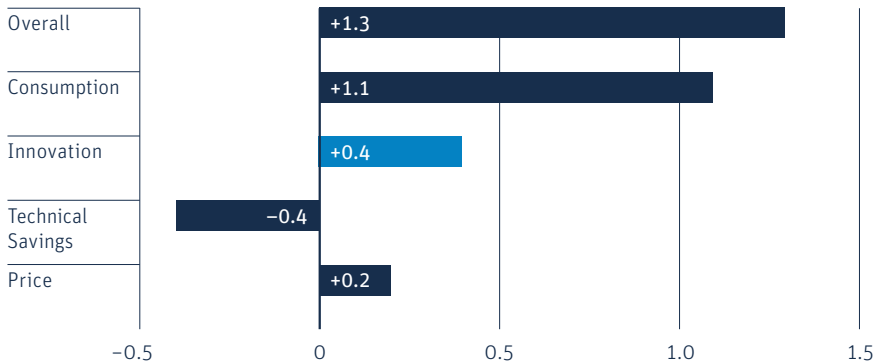


## 2009 Sales Growth: Driven by what Components?

Changes in sales in EUR billion



Source: IGES

The EUR 1.3 billion sales increase in the SHI market in 2009 was driven by opposing components whose effect was partly to increase and partly to decrease sales. Consumption (increase in prescribed daily doses) and innovative pharmaceuticals have created an additional demand of around EUR 1.1 and EUR 0.4 billion respectively. In contrast, “technical” savings, e.g. the selection of more cost-effective drugs, including those with active ingredients whose patents expired in 2009, or larger packages, have resulted in total savings of EUR 0.4 billion. Increased prices boosted sales by EUR 0.2 billion.

As in the past four years, the dominant factors in the dynamics of the pharmaceutical market are medical and therapeutic needs.