efpia
European Federation of Pharmaceutical Industries and Associations

The Pharmaceutical Industry in Figures

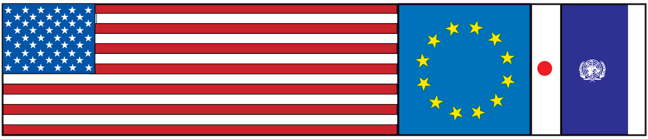
Key Data • 2011 update

MAIN TRENDS

In 2010 the research-based pharmaceutical industry invested an estimated € 27,000 million in R&D in Europe. It directly employs 640,000 people and generates three to four times more employment indirectly – upstream and downstream – than it does directly. However, the sector faces real challenges. Besides the additional regulatory hurdles and escalating R&D costs, the sector has been severely hit by the impact of fiscal austerity measures introduced by governments across much of Europe in 2010 and in 2011.

- There is rapid growth in the market and research environment in emerging economies such as Brazil, China and India, leading to a migration of economic and research activities outside of Europe to these fast-growing markets. In 2010 the Brazilian and Chinese markets grew by more than 20% (20,1% and 21,9% respectively) compared with an average market growth of 1.8% for the five major European markets and 3.3% for the US market (source: IMS).
- In 2010, North America accounted for 42.3% of world pharmaceutical sales compared with 29.2% for Europe. According to IMS data, 61% of sales of new medicines launched during the period 2005-2009 were on the US market, compared with 22% on the European market.
- The fragmentation of the EU pharmaceutical market has resulted in a lucrative parallel trade. This benefits neither social security nor patients and deprives the industry of additional resources to fund R&D. Parallel trade was estimated to amount to € 5,200 million (value at ex-factory prices) in 2009.

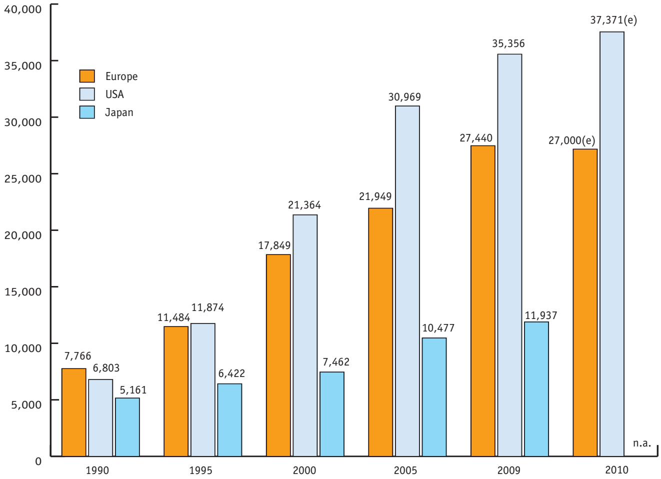
GEOGRAPHICAL BREAKDOWN (BY MAIN MARKETS) OF SALES OF NEW MEDICINES LAUNCHED DURING THE PERIOD 2005-2009



Note: New medicines cover all new active ingredients marketed for the first time on the world market during the period 2005-2009
Percentages do not add due to rounding
Pharmerging comprises 17 countries ranked by IMS Health as high-growth pharmaceutical markets (Argentina, Brazil, China, Egypt, India, Indonesia, Mexico, Pakistan, Poland, Romania, Russia, South Africa, Thailand, Turkey, Venezuela, Vietnam and The Ukraine)

Source: IMS Health MIDAS MAT December 2010

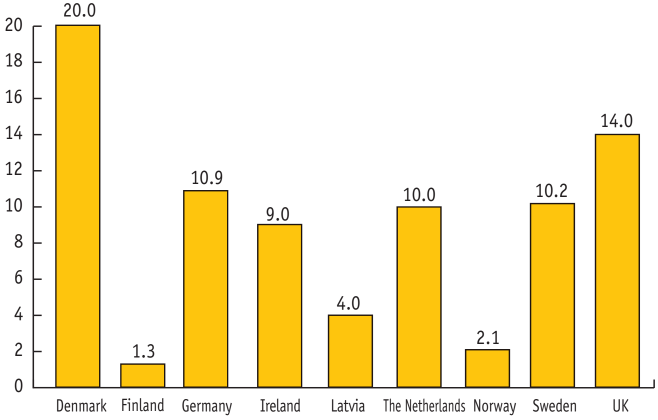
PHARMACEUTICAL R&D EXPENDITURE IN EUROPE, USA AND JAPAN (MILLION OF NATIONAL CURRENCY UNITS*), 1990-2010



*Note: Europe: € million; USA: $ million; Japan: ¥ million x 100
(e): estimate

Source: EFPIA member associations, PhRMA, JPMA

SHARE OF PARALLEL IMPORTS IN PHARMACY MARKET SALES (%) - 2009



Source: EFPIA member associations (estimate)

THE PHARMACEUTICAL INDUSTRY: A KEY ASSET TO SCIENTIFIC AND MEDICAL PROGRESS

Science today offers greater promise for finding new treatments than ever before, thanks to new knowledge and new technologies. Today, European citizens can expect to live up to 30 years longer than they did a century ago. Huge reductions in mortality (e.g. in HIV/AIDS, many cancers or cardiovascular disease) and significant progress in the quality of life are the results of some large and many small steps in biopharmaceutical research.

The key contribution of the research-based pharmaceutical industry to medical progress is turning fundamental research into innovative treatments that are widely available and accessible to patients. European citizens can expect not only to live longer, but to live longer and be healthier. High blood pressure and cardiovascular disease can be controlled with antihypertensive medicines and cholesterol-lowering medicines, knee or hip replacements prevent patients from immobility, and some cancers can be controlled or even cured thanks to newer targeted medicines. Yet, there remain huge challenges in many disease areas such as Alzheimer, multiple sclerosis, many cancers and orphan diseases.

Five-year Relative Survival (%)* during Three Time Periods By Cancer Site

Site	1975-1977	1984-1986	1996-2002
All sites	50	53	66
Breast (female)	75	79	89
Colon	51	59	65
Leukemia	35	42	49
Lung and bronchus	13	13	16
Melanoma	82	86	92
Non-Hodgkin lymphoma	48	53	63
Ovary	37	40	45**
Pancreas	2	3	5
Prostate	69	76	100
Rectum	49	57	66
Urinary bladder	73	78	82

*5-year relative survival rates based on follow up of patients through 2003.

**Recent changes in classification of ovarian cancer have affected 1996-2002 survival rates.

Source: Surveillance, Epidemiology, and End Results Program, 1975-2003, Division of Cancer Control and Population Sciences, National Cancer Institute, 2006.

THE PHARMACEUTICAL INDUSTRY: A KEY ASSET TO THE EUROPEAN ECONOMY

As well as driving medical progress and improving health within Europe and worldwide, the research-based pharmaceutical industry is a key asset of the European economy. It is one of Europe's top performing high-technology sectors.

INDUSTRY (EFPIA Total) (1)	1990	2000	2009	2010
Production	63,010	123,793	189,012	190,000 (e)
Exports (2)	23,180	90,935	249,426	270,000 (e)
Imports (2)	16,113	68,841	190,635	200,000 (e)
Trade balance	7,067	22,094	58,791	70,000 (e)
R&D expenditure	7,766	17,849	27,440	27,000 (e)
Employment (units)	500,879	536,733	640,286	640,000 (e)
R&D employment (units)	76,126	88,397	116,682	115,000 (e)
Pharmaceutical market value at ex-factory prices	41,147	86,704	149,193	152,500 (e)
Pharmaceutical market value at retail prices	64,626	140,684	217,293	222,000 (e)
Payment for pharmaceuticals by statutory health insurance systems (3)	40,807	76,909	121,228	120,000 (e)

Values in € million unless otherwise stated
(1) Data relate to EU-27, Norway and Switzerland since 2005 (EU-15 before 2005)
(2) Data relating to total exports and total imports include EU-27 intra-trade (double counting in some cases)
(3) Since 1998 data relate to ambulatory care only

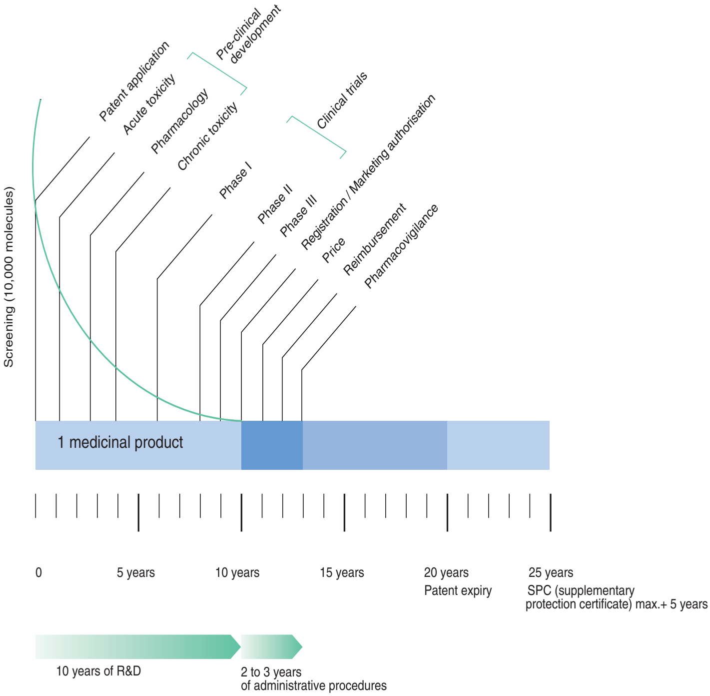
Source: EFPIA member associations (official figures) - (e): EFPIA estimate; Eurostat (EU-27 trade data 1995-2010)

PHARMACEUTICAL INDUSTRY RESEARCH & DEVELOPMENT IN EUROPE

All new medicines introduced into the market are the result of lengthy, costly and risky research and development (R&D) conducted by pharmaceutical companies:

- By the time a medicinal product reaches the market, an average of 12-13 years will have elapsed since the first synthesis of the new active substance;
- The cost of researching and developing a new chemical or biological entity was estimated at € 1,059 million ($ 1,318 million in year 2005 dollars) in 2005 (Di Masi J., Tufts University, Centre for the Study of Drug Development, 2007);
- On average, only one or two of every 10,000 substances synthesised in laboratories, will successfully pass all the stages to become marketable medicines.

PHASES OF THE RESEARCH AND DEVELOPMENT PROCESS



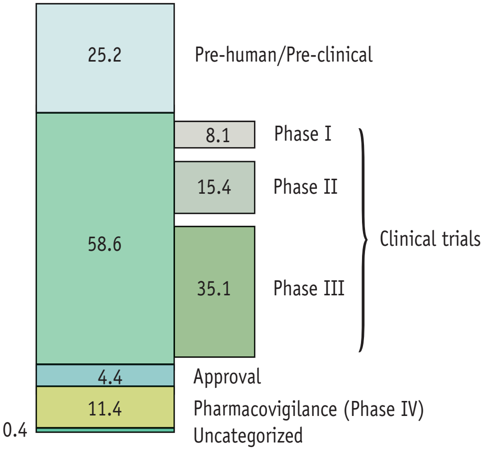
PHARMACEUTICAL INDUSTRY RESEARCH & DEVELOPMENT IN EUROPE

EFPIA 2009	€ million
Austria	280
Belgium	1,809
Bulgaria	1
Croatia	27
Cyprus	14
Czech Republic	49
Denmark	1,102
Estonia	n.a.
Finland	255
France	4,964
Germany	5,379
Greece	84
Hungary	n.a.
Ireland	260
Italy	1,220
Latvia	n.a.
Lithuania	n.a.
Malta	n.a.
Netherlands	550
Norway	96
Poland	n.a.
Portugal	103
Romania	150
Slovakia	n.a.
Slovenia	88
Spain	967
Sweden	746
Switzerland	4,320
United Kingdom	4,976
Total	**27,440**

Note: The figures relate to the R&D carried out in each country.
Austria, Cyprus: 2007 data
France, Greece, Portugal: 2008 data
Belgium, Denmark, Greece, Ireland, Italy, The Netherlands, Norway, Romania, Sweden (LIF members), Switzerland (Interpharma members): estimate

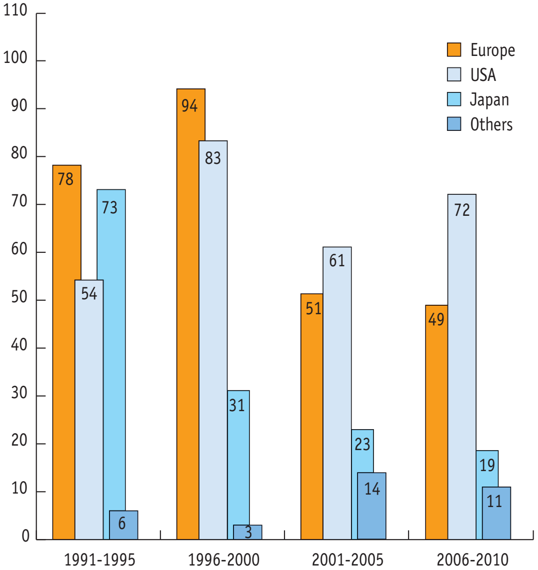
Source: EFPIA member associations (official figures)

ALLOCATION OF R&D INVESTMENTS BY FUNCTION (%)



Source: PhRMA, Annual Membership Survey 2011 (percentages calculated from 2009 data)

NUMBER OF NEW CHEMICAL OR BIOLOGICAL ENTITIES (1991-2010)

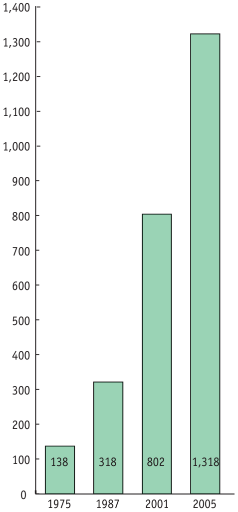


Source: SCRIP – EFPIA calculations (according to nationality of mother company)

IMPORTANCE OF PHARMACEUTICAL R&D

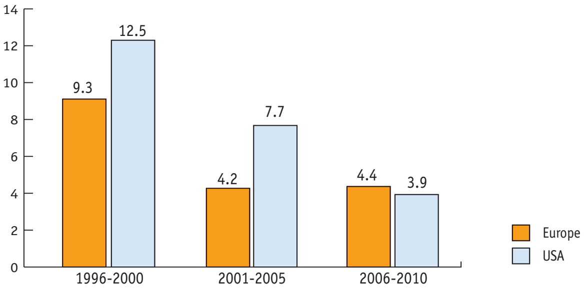
In 2009 the pharmaceutical industry invested about € 27,400 million in R&D in Europe. After a decade of strong US market dominance, which led to a significant shift of economic and pharmaceutical research activity towards the US during the period 1995-2005, Europe is now also facing increasing competition from emerging economies. Today there is rapid growth in the market and research environment in emerging economies such as Brazil, China and India, resulting in further migration of economic and research activities outside of Europe to these fast-growing markets. The geographical balance of the pharmaceutical market – and ultimately the R&D base – is likely to shift gradually towards emerging economies.

ESTIMATED FULL COST OF BRINGING A NEW CHEMICAL OR BIOLOGICAL ENTITY TO MARKET ($ MILLION - YEAR 2005 $)



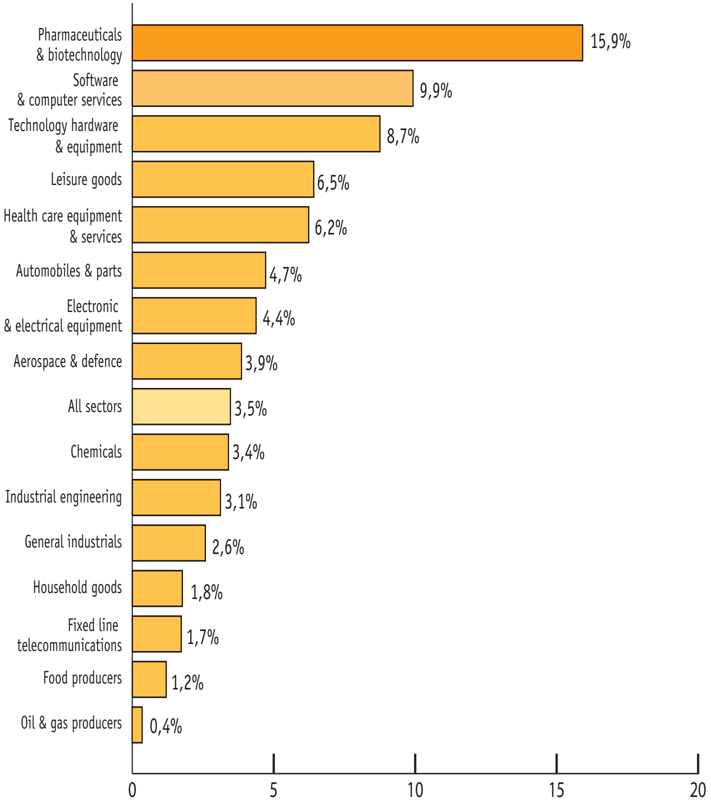
Source: J.A. DiMasi and H.G. Grabowski, 'The Cost of Biopharmaceutical R&D: Is Biotech Different?, Managerial and Decision Economics 28 (2007): 469-479

PHARMACEUTICAL R&D EXPENDITURE - ANNUAL GROWTH RATE (%)



Source: EFPIA, PhRMA

RANKING OF INDUSTRIAL SECTORS BY OVERALL SECTOR R&D INTENSITY (R&D AS PERCENTAGE OF NET SALES – 2009)



Note: Data relate to the top 1,400 companies with registered offices in the EU, Japan, the USA and the Rest of the World, ranked by total worldwide R&D investment

Source: The 2010 EU Industrial R&D Investment Scoreboard, European Commission, JRC/DG Research

According to EUROSTAT data, the pharmaceutical industry is the high technology sector with the highest value-added per person employed, well ahead of the average value for high-tech and manufacturing industries. The pharmaceutical industry is also the sector with the highest ratio of R&D investment to net sales. It amounts to approximately 3.5% of total EU manufacturing value-added and 18.9% of the total worldwide business R&D expenditure.

PHARMACEUTICAL PRODUCTION

EFPIA 2009	€ million
Austria	2,175
Belgium	5,419
Bulgaria	156
Croatia	n.a.
Cyprus	135
Czech Republic	139
Denmark	5,769
Estonia	n.a.
Finland	1,058
France	24,953
Germany	26,381
Greece	1,008
Hungary	n.a.
Ireland	21,700
Italy	23,395
Latvia	105
Lithuania	32
Malta	34
Netherlands	5,664
Norway	679
Poland	1,660
Portugal	1,973
Romania	280
Slovakia	n.a.
Slovenia	1,375
Spain	14,152
Sweden	6,226
Switzerland	26,225
United Kingdom	18,319
Total	**189,012**

Note: All data based on SITC 54
Cyprus: 2008 data; Norway, Romania: 2007 data; The Netherlands: 2005 data; Malta: 2004 data
Czech Republic, Denmark, France (new methodology, source: INSEE), Ireland, Italy, Norway, Portugal, Spain, Sweden, Switzerland: estimate
Bulgaria, Cyprus, France, Germany, Ireland, Latvia, Norway, Switzerland: veterinary products excluded

Source: EFPIA member associations (official figures)

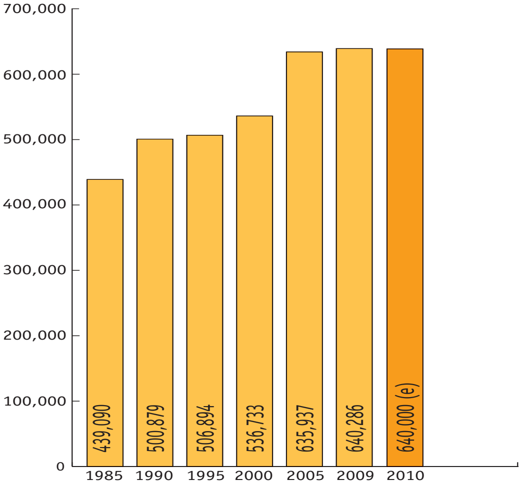
EMPLOYMENT IN THE PHARMACEUTICAL INDUSTRY

EFPIA 2009	Units
Austria	10,697
Belgium	31,966
Bulgaria	1,550
Croatia	n.a.
Cyprus	1,140
Czech Republic	2,300
Denmark	20,223
Estonia	450
Finland	5,623
France	100,355
Germany	104,605
Greece	14,000
Hungary	n.a.
Iceland	n.a.
Ireland	24,500
Italy	67,500
Latvia	n.a.
Lithuania	n.a.
Malta	445
Netherlands	16,900
Norway	4,630
Poland	24,620
Portugal	9,761
Romania	25,000
Slovakia	2,000
Slovenia	10,820
Spain	39,155
Sweden	14,766
Switzerland	35,280
United Kingdom	72,000
Total	**640,286**

Note: United Kingdom: 2008 data; Cyprus: 2007 data; Malta: 2004 data
Austria, Belgium, France, Greece, Ireland, Italy, Malta, Netherlands, Norway, Poland, Romania, Slovenia, Sweden, United Kingdom: estimate

Source: EFPIA member associations (official figures)

EMPLOYMENT IN THE PHARMACEUTICAL INDUSTRY (1985-2010)

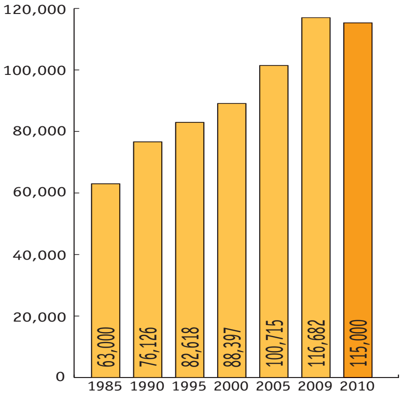


Note: Data includes Estonia (since 2009), Czech Republic (since 2008), Cyprus (since 2007), Romania & Slovakia (since 2005), Malta, Poland and Slovenia (since 2004)

Source: EFPIA member associations (official figures) - (e): EFPIA estimate

The research-based pharmaceutical industry is one of Europe's major high-technology industrial employers. Recent studies carried out in some countries showed that the research-based pharmaceutical industry generates three to four times more employment indirectly - upstream and downstream - than it does directly, a significant proportion being high value added jobs (e.g. clinical science, universities, etc).

EMPLOYMENT IN PHARMACEUTICAL R&D (1985-2010)



Note: Data includes Slovenia (since 2004), Romania (since 2005), Czech Republic and Estonia (since 2009)

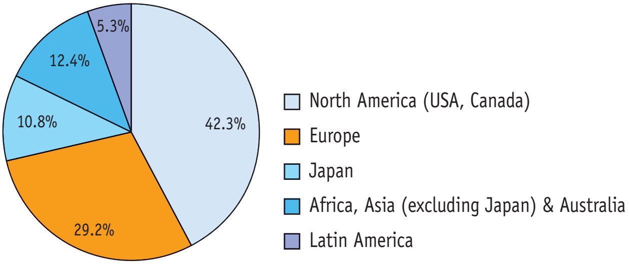
Bulgaria, Cyprus, Greece, Hungary, Iceland, Latvia, Lithuania, Malta, Poland, Portugal, Slovakia: data not available

Source: EFPIA member associations - (e): EFPIA estimate

PHARMACEUTICAL SALES

The world pharmaceutical market was worth an estimated € 597,043 million ($ 791,500 million) at ex-factory prices in 2010. The North American market (USA & Canada) remained the world's largest market with a 42.3% share, well ahead of Europe and Japan.

BREAKDOWN OF THE WORLD PHARMACEUTICAL MARKET – 2010 SALES

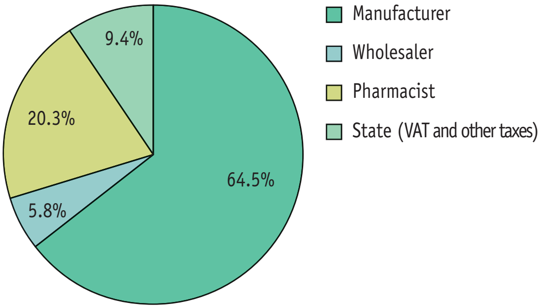


Note: Europe includes non-EU members and CIS markets
Source: IMS MIDAS, 2011 (data relate to the 2010 audited market at ex-factory prices)

PRICE STRUCTURE

Distribution margins, which are generally fixed by governments, and VAT rates differ significantly from country to country in Europe. On average, approximately 36% of the retail price of a medicine does not revert to the manufacturer but rather to distributors (pharmacists and wholesalers) and the State.

BREAKDOWN OF THE RETAIL PRICE OF A MEDICINE, 2009 (%)



Note: Non-weighted average for Europe (average estimate for 20 countries)
Source: EFPIA member associations

PHARMACEUTICAL MARKET VALUE (AT EX-FACTORY PRICES)

EFPIA 2009	€ million
Austria	2,996
Belgium	4,320
Bulgaria	616
Croatia	601
Cyprus	188
Czech Republic	1,895
Denmark	2,073
Estonia	189
Finland	1,979
France	27,146
Germany	27,047
Greece	5,850
Hungary	1,984
Iceland	101
Ireland	1,888
Italy	18,540
Latvia	277
Lithuania	478
Malta	77
Netherlands	4,654
Norway	1,350
Poland	4,484
Portugal	3,716
Romania	1,909
Slovakia	1,064
Slovenia	509
Spain	14,744
Sweden	2,771
Switzerland	3,235
United Kingdom	12,512
Total	**149,193**

Note: Medicinal products as defined by Directive 2001/83/EEC
Denmark, Finland, Iceland, Latvia, Lithuania, Norway, Slovenia, Sweden: pharmaceutical market value at pharmacy purchasing prices
Cyprus, Iceland: 2008 data
Greece: including parallel exports
Belgium, France, Germany, Ireland, Italy, Malta, Norway, Spain, United Kingdom: estimate

Source: EFPIA member associations (official figures) – Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Lithuania, Poland, Romania, Slovakia, Slovenia: IMS

The figures above are for pharmaceutical sales, at ex-factory prices, through all distribution channels (pharmacies, hospitals, dispensing doctors, supermarkets, etc.), whether dispensed on prescription or at the patient's request. Samples and sales of veterinary medicines are excluded.

VAT RATES APPLICABLE TO MEDICINES

The table below shows the VAT rates applied to medicines in European countries on 1 January 2011.

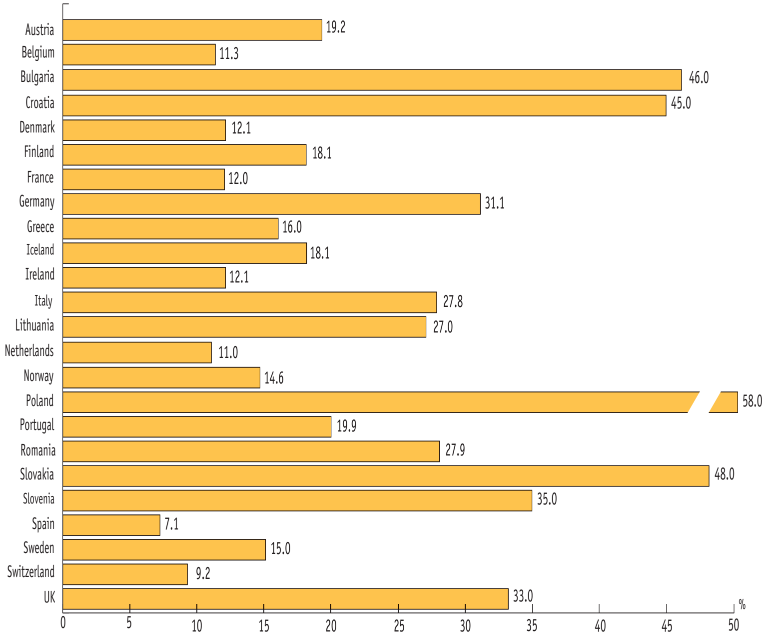
Country	Standard VAT rate (%)	VAT rates applied to medicines	
		Prescription (%)	OTC (%)
Austria	20.0	10.0	10.0
Belgium	21.0	6.0	6.0
Bulgaria	20.0	20.0	20.0
Croatia	23.0	0.0	23.0
Cyprus	15.0	0.0	0.0
Czech Republic	20.0	10.0	10.0
Denmark	25.0	25.0	25.0
Estonia	20.0	9.0	9.0
Finland	23.0	9.0	9.0
France (1)	19.6	2.1	5.5
Germany	19.0	19.0	19.0
Greece	23.0	6.5	6.5
Hungary	25.0	5.0	5.0
Iceland	24.5	24.5	24.5
Ireland (2)	21.0	0.0 – 21.0	0.0 – 21.0
Italy	20.0	10.0	10.0
Latvia	22.0	12.0	12.0
Lithuania	21.0	5.0	5.0
Luxembourg	15.0	3.0	3.0
Malta	18.0	0.0	0.0
Netherlands	19.0	6.0	6.0
Norway	25.0	25.0	25.0
Poland	23.0	8.0	8.0
Portugal	23.0	6.0	6.0
Romania	24.0	9.0	9.0
Slovakia	20.0	10.0	10.0
Slovenia	20.0	8.5	8.5
Spain	18.0	4.0	4.0
Sweden	25.0	0.0	25.0
Switzerland	8.0	2.5	2.5
United Kingdom	20.0	0.0	20.0

(1) France: reimbursable medicines 2.1%; non-reimbursable medicines 5.5%
(2) Ireland: oral medication 0%; other medication 21%

GENERICS

The term 'generic' is widely used but its definition is not always consistent between countries. Generics are usually produced by a manufacturer who is not the inventor of the original product, and are marketed when intellectual property protection rights are exhausted. The market share of generics is significantly higher in new EU Member States with historically low levels of intellectual property protection.

SHARE (ESTIMATE - IN %) ACCOUNTED FOR BY GENERICS IN PHARMACEUTICAL MARKET SALES VALUE (AT EX-FACTORY PRICES), 2009



Note:

Denmark, Finland, Greece, U.K.: share of generics in pharmacy market sales

Austria, Belgium, Bulgaria, France, Germany, Ireland, Italy (as referred to transparency lists), Lithuania, The Netherlands, Poland, Portugal, Slovenia, Spain: share of generics in reimbursable pharmacy market sales

Switzerland: share of generics in total reimbursable market sales

Croatia, Iceland, Norway, Romania, Slovakia, Sweden: share of generics in total market sales

Iceland, Norway: 2008 data

France: data relate only to those active substances listed on the official list of medicines

U.K.: pharmacy market sales at NHS reimbursement prices

Definition: 'generic' means a medicine based on an active substance that is out of patent and which is marketed under a different name from that of the original branded medicine (generics data do not include those generics marketed by the originator).

Source: EFPIA member associations

PHARMACEUTICAL EXPORTS

EFPIA 2009	€ million
Austria	5,552
Belgium	37,407
Bulgaria	321
Cyprus	139
Czech Republic	994
Denmark	5,714
Estonia	35
Finland	843
France	24,761
Germany	47,550
Greece	938
Hungary	2,274
Ireland	20,663
Italy	11,523
Latvia	225
Lithuania	190
Luxembourg	109
Malta	149
Netherlands	9,908
Norway	476
Poland	1,228
Portugal	501
Romania	373
Slovakia	272
Slovenia	1,553
Spain	7,902
Sweden	6,380
Switzerland	38,534
United Kingdom	22,912
Total	**249,426**

Note: All data based on SITC 54
Norway, Switzerland: veterinary products excluded

Source: Eurostat (COMEXT database – February 2011)
Norway: Statistics Norway; Switzerland: Swiss Federal Trade Office

PHARMACEUTICAL IMPORTS

EFPIA 2009	€ million
Austria	4,931
Belgium	31,294
Bulgaria	609
Cyprus	212
Czech Republic	2,750
Denmark	2,377
Estonia	230
Finland	1,667
France	19,647
Germany	34,303
Greece	3,940
Hungary	2,042
Ireland	2,848
Italy	15,356
Latvia	400
Lithuania	534
Luxembourg	347
Malta	81
Netherlands	10,125
Norway	1,231
Poland	3,744
Portugal	2,244
Romania	1,907
Slovakia	1,351
Slovenia	688
Spain	12,208
Sweden	2,925
Switzerland	15,545
United Kingdom	15,099
Total	**190,635**

Note: All data based on SITC 54
Norway, Switzerland: veterinary products excluded

Source: Eurostat (COMEXT database – February 2011)
Norway: Statistics Norway; Switzerland: Swiss Federal Trade Office

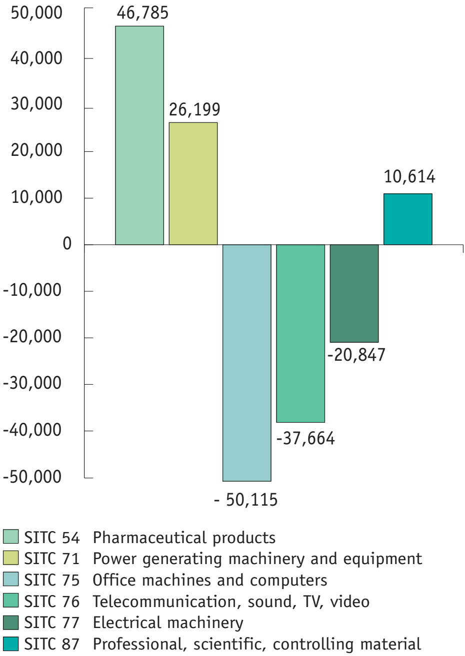
PHARMACEUTICAL TRADE BALANCE

EFPIA 2009	€ million
Austria	621
Belgium	6,113
Bulgaria	- 288
Cyprus	- 73
Czech Republic	- 1,756
Denmark	3,337
Estonia	- 195
Finland	- 824
France	5,114
Germany	13,247
Greece	- 3,002
Hungary	232
Ireland	17,815
Italy	- 3,833
Latvia	- 175
Lithuania	- 344
Luxembourg	- 238
Malta	68
Netherlands	- 217
Norway	- 755
Poland	- 2,516
Portugal	- 1,743
Romania	- 1,534
Slovakia	- 1,079
Slovenia	865
Spain	- 4,306
Sweden	3,455
Switzerland	22,989
United Kingdom	7,813
Total	**58,791**

Note: All data based on SITC 54
Norway, Switzerland: veterinary products excluded

Source: Eurostat (COMEXT database – February 2011)
Norway: Statistics Norway; Switzerland: Swiss Federal Trade Office

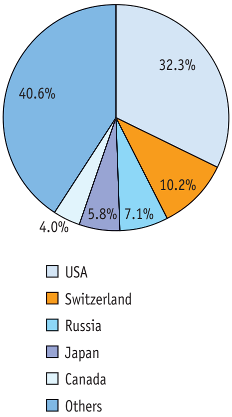
EU-27 TRADE BALANCE - HIGH TECHNOLOGY SECTORS (€ MILLION) - 2010



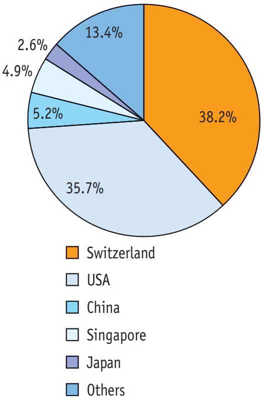
Source: Eurostat, External and intra-European Union trade, Monthly statistics, Issue number 4/2011

THE EUROPEAN UNION'S TOP 5 PHARMACEUTICAL TRADING PARTNERS - 2010

EU exports



EU imports



Source: SITC 54, Eurostat, External and intra-European Union trade, Monthly statistics, Issue number 4/2011

TOTAL SPENDING (PUBLIC AND PRIVATE) ON HEALTH-CARE AS A PERCENTAGE OF GDP AT MARKET PRICES

	1960	1970	1980	1990	2000	2008
Austria	4.3	5.2	7.4	8.3	9.9	10.5
Belgium	-	3.9	6.3	7.2	9.0	11.1*
Czech Republic	-	-	-	4.7	6.5	7.1
Denmark	-	-	8.9	8.3	8.3	9.7
Estonia	-	-	-	-	5.3	6.1
Finland	3.8	5.5	6.3	7.7	7.2	8.4
France	3.8	5.4	7.0	8.4	10.1	11.2
Germany	-	6.0	8.4	8.3	10.3	10.5
Greece	-	5.4	5.9	6.6	7.9	9.7
Hungary	-	-	-	-	7.0	7.3
Iceland	3.0	4.7	6.3	7.8	9.5	9.1
Ireland	3.7	5.1	8.2	6.1	6.1	8.7
Italy	-	-	-	7.7	8.1	9.1
Luxembourg	-	3.1	5.2	5.4	7.5	6.8
Netherlands	-	-	7.4	8.0	8.0	9.9*
Norway	2.9	4.4	7.0	7.6	8.4	8.5*
Poland	-	-	-	4.8	5.5	7.0
Portugal	-	2.5	5.3	5.9	8.8	9.9
Slovakia	-	-	-	-	5.5	8.0
Slovenia	-	-	-	-	8.3	8.3
Spain	1.5	3.5	5.3	6.5	7.2	9.0
Sweden	-	6.8	8.9	8.2	8.2	9.4
Switzerland	4.9	5.4	7.3	8.2	10.2	10.7*
Turkey	-	-	2.4	2.7	4.9	6.2
United Kingdom	3.9	4.5	5.6	5.9	7.0	8.7
Europe	3.5	4.8	6.6	6.9	7.8	8.8
USA	5.2	7.1	9.0	12.2	13.4	16.0
Japan	3.0	4.6	6.5	6.0	7.7	8.1

* estimate

Note: Denmark, Greece, Japan: 2007 data; Portugal: 2006 data
Europe: non-weighted average (22 countries) – EFPIA calculations

Source: OECD Health Data 2010, Statistics and Indicators for 30 Countries, October 2010

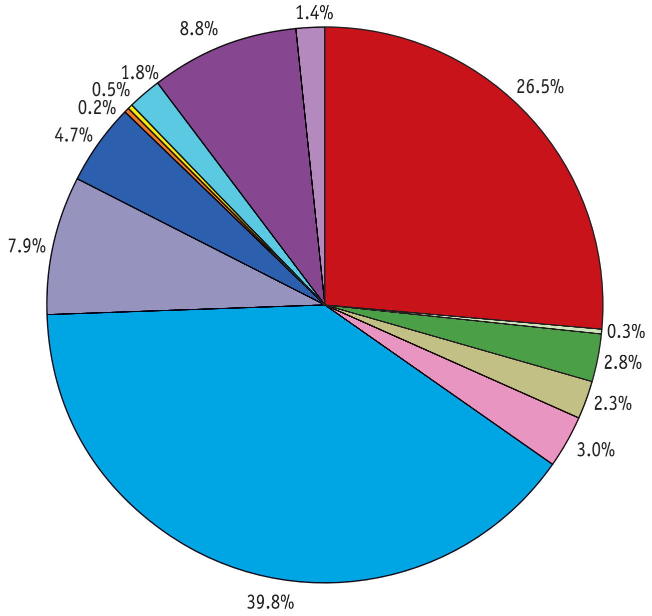
PAYMENT FOR PHARMACEUTICALS BY COMPULSORY HEALTH INSURANCE SYSTEMS AND NATIONAL HEALTH SERVICES (ambulatory care only)

EFPIA 2009	€ million
Austria	2,212
Belgium	3,406
Bulgaria	169
Croatia	349
Cyprus	98
Czech Republic	1,387
Denmark	927
Estonia	89
Finland	1,245
France	23,010
Germany	30,742
Greece	5,090
Hungary	1,295
Iceland	65
Ireland	1,977
Italy	11,193
Latvia	103
Lithuania	203
Malta	91
Netherlands	5,081
Norway	986
Poland	1,898
Portugal	1,559
Romania	800
Slovakia	1,015
Slovenia	300
Spain	12,028
Sweden	1,775
Switzerland	3,201
United Kingdom	8,934
Total	**121,228**

Note: Cyprus, Hungary, Iceland: 2008 data; Croatia, Malta: 2007 data
France, Greece, Ireland, Netherlands, Norway, Sweden,
United Kingdom: estimate

Source : EFPIA member associations (official figures)

CAUSES OF DEATH IN EUROPE (EU-27)



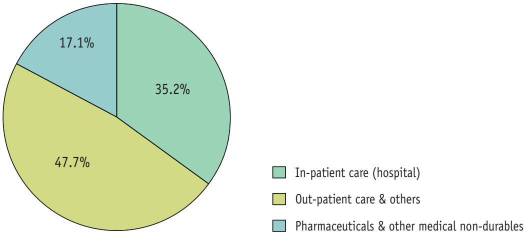
- Certain infectious and parasitic diseases
- Neoplasms
- Diseases of the blood(-forming organs), immunological disorders
- Endocrine, nutritional and metabolic diseases
- Mental and behavioural disorders
- Diseases of the nervous system and the sense organs
- Diseases of the circulatory system
- Diseases of the respiratory system
- Diseases of the digestive system
- Diseases of the skin and subcutaneous tissue
- Diseases of the musculoskeletal system/connective tissues
- Diseases of the genitourinary system
- Others (non-disease directly related causes of deaths)

Data source: Eurostat, data relate to year 2008 (non-disease directly related causes of deaths: EFPIA calculations)

THE ADDED VALUE OF MEDICINES IN HEALTHCARE

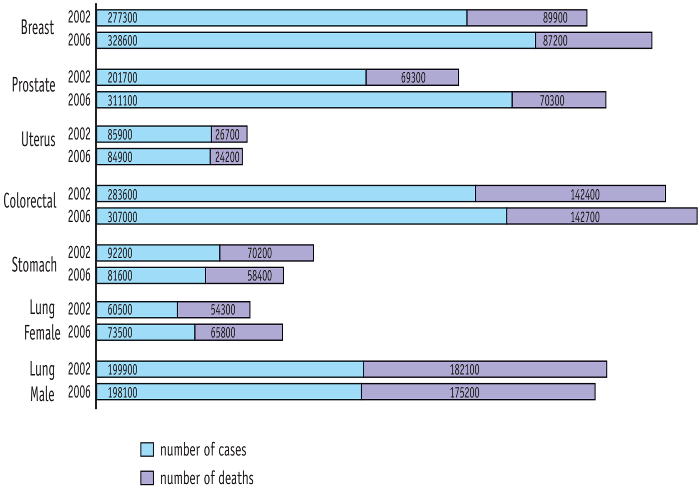
Medicines only constitute a small part of disease costs with, on average, 17.1% of total health expenditure in Europe being spent on pharmaceuticals and other medical non durables. In costly diseases such as cancer and rheumatoid arthritis, medicines account for even less than 10% of the total disease costs. Medicines can also generate additional savings, for example by substantially reducing costs in other branches of healthcare (hospital stays, invalidity, etc).

BREAKDOWN OF TOTAL HEALTH EXPENDITURE IN EUROPE – 2008



Source: OECD Health Data 2010, Statistics and Indicators for 30 countries, October 2010 – EFPIA calculations (non-weighted average for 20 EU & EFTA countries)

NUMBER OF NEW CANCER CASES AND DEATHS IN SELECTED CANCERS 2002-2006



Data source: Comparator Report on Patient Access to Cancer Drugs in Europe, N. Wilking, B. Jönsson, D. Högberg, N. Justo, February 2009 (www.comparatorreports.se)

EFPIA MEMBER ASSOCIATIONS

Austria
Fachverband der Chemischen Industrie Österreichs (FCIO)

Denmark
Laegemiddelindustriforeningen
The Danish Association of the Pharmaceutical Industry (Lif)

France
Les Entreprises du Médicament (LEEM)

Greece
Hellenic Association of Pharmaceutical Companies (SFEE)

Italy
Associazione delle Imprese del Farmaco (Farmindustria)

Norway
Legemiddelindustriforeningen
Norwegian Association of Pharmaceutical Manufacturers (LMI)

Portugal
Associação Portuguesa da Indústria Farmacêutica (Apifarma)

Sweden
Läkemedelsindustriföreningen
The Swedish Association of the Pharmaceutical Industry (LIF)

Turkey
Arastirmaci Ilac Firmalari Dernegi (AIFD)

Belgium
Association Générale de l'Industrie du Médicament (pharma.be)

Finland
Lääketeollisuus ry
Pharma Industry Finland (PIF)

Germany
Verband Forschender Arzneimittelhersteller (VFA)

Ireland
Irish Pharmaceutical Healthcare Association (IPHA)

Netherlands
Vereniging Innovatieve Geneesmiddelen Nederland (Nefarma)

Poland
Employers Union of Innovative Pharmaceutical Companies (Infarma)

Spain
Asociación Nacional Empresarial de la Industria Farmacéutica (Farmaindustria)

Switzerland
Société Suisse des Industries Chimiques (SSIC)

United Kingdom
The Association of the British Pharmaceutical Industry (ABPI)

ASSOCIATIONS WITH LIAISON STATUS

Bulgaria: Association of Research-based Pharmaceutical Manufacturers in Bulgaria (ARPharM)
Croatia: Croatian Association of Research-based Pharmaceutical Companies (CARPC)
Cyprus: Association of Pharmaceutical Companies (CAPC)
Czech Republic: Association of Innovative Pharmaceutical Industry (AIFP)
Estonia: Association of International Pharmaceutical Manufacturers in Estonia (AIPME)
Hungary: Association of Innovative Pharmaceutical Manufacturers (AIPM)
Latvia: Association of International Research-based Pharmaceutical Manufacturers (AFA)
Lithuania: The Innovative Pharmaceutical Industry Association (IFPA)
Malta: Maltese Pharmaceutical Association (PRIMA)
Romania: Association of International Medicines Manufacturers (ARPIM)
Serbia: Innovative Drug Manufacturers' Fund (INOVIA)
Slovakia: Slovak Association of Research-based Pharmaceutical Companies (SAFS)
Slovenia: Forum of International Research and Development Pharmaceutical Industries (EIG)

MEMBER COMPANIES

FULL MEMBERS

Abbott	USA
Almirall	Spain
Amgen	USA
Astellas Pharma Europe	United Kingdom
AstraZeneca	United Kingdom / Sweden
Baxter	USA
Bayer HealthCare	Germany
Biogen Idec	USA
Boehringer Ingelheim	Germany
Bristol Myers Squibb	USA
Chiesi Farmaceutici	Italy
Daiichi-Sankyo Europe	Germany
Eisai	Japan
Eli Lilly & Co	USA
Laboratorios Dr Esteve	Spain
Genzyme	USA
GlaxoSmithKline	United Kingdom
Grünenthal	Germany
Ipsen	France
Johnson & Johnson	USA
H. Lundbeck	Denmark
Menarini	Italy
Merck Serono	Germany
Merck & Co	USA
Novartis	Switzerland
Novo Nordisk	Denmark
Orion Pharma	Finland
Pfizer	USA
Roche	Switzerland
Sanofi	France
Servier	France
Sigma-Tau	Italy
Takeda	Japan
UCB	Belgium
Warner Chilcott	USA

AFFILIATE MEMBERS

Bial	Portugal
Bracco	Italy
Otsuka Pharmaceuticals	Japan
Recordati	Italy
Vifor Pharma	Switzerland

efpia

European Federation of Pharmaceutical Industries and Associations

EFPIA (The European Federation of Pharmaceutical Industries and Associations) represents the research-based pharmaceutical industry operating in Europe.

Founded in 1978, its members comprise 31 national pharmaceutical industry associations and 40 leading pharmaceutical companies undertaking research, development and manufacturing of medicinal products in Europe for human use.

Its mission is to promote pharmaceutical research and development and the best conditions in Europe for companies to bring to market medicines that improve human health and the quality of life around the world.

Through its membership, EFPIA represents the common views of 2,000 large, medium and small companies including the entire European research-based pharmaceutical sector whose interests also include an important part of the generics segment. Two specialised groups have been created within EFPIA to address specific issues relating to vaccines (EVM – European Vaccine Manufacturers) and the needs of biopharmaceutical companies (EBE - European Biopharmaceutical Enterprises).

Further details about the Federation and its activities can be obtained from:

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