

# Prescription Drugs: Market Research Report

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## Abstracts

This report analyzes the worldwide markets for Prescription Drugs in US\$ Billion by the following therapeutic class – Oncologics/ Cancer Drugs, Lipid Regulators, Respiratory Agents, Proton Pump Inhibitors, Antidiabetics, Antipsychotics, Antidepressants, Angiotensin II Antagonists, Anti-Epileptics, Autoimmune Agents, and Others.

The report provides separate comprehensive analytics for the US Canada, Japan, Europe, Asia-Pacific, Latin America, and Rest of World.

Annual forecasts are provided for each region for the period 2006 through 2015.

A five-year historic analysis is also provided for these markets.

The report profiles 292 companies including many key and niche players worldwide such as Abbott Laboratories, Allergan, Inc., Amgen, Inc., AstraZeneca, Bayer AG, Bristol-Myers Squibb, Boehringer Ingelheim Group, Dr. Reddy's Laboratories Ltd., Eli Lilly and Company, F. Hoffmann-La Roche Ltd., Genentech, Inc., GlaxoSmithKline Plc, Johnson & Johnson, Inc., Merck & Co. Inc., Merck Serono International S.A., Mylan, Inc., Novartis AG, Pfizer, Inc., Ranbaxy Laboratories Limited, Sanofi-Aventis SA, Sanofi Pasteur, Takeda Pharmaceutical Company Limited, Teva Pharmaceutical Industries Ltd., Watson Pharmaceuticals, Inc., and Wyeth.

Market data and analytics are derived from primary and secondary research.

Company profiles are mostly extracted from URL research and reported select online sources.

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GSK Allies with Wellcome to Develop Antibacterials for Hospital-Contracted Infections

Bristol-Myers and Pfizer Ink Development and Commercialization Agreements

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Iroko Pharmaceuticals Acquires Rights to Indocin® and Aldomet® Products

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Wockhardt Obtains FDA Approval for a Painkiller in the US

Ortho-McNeil Obtains Pediatric Extension for LEVAQUIN®

GlaxoSmithKline Obtains FDA Approval for Tykerb®

Terapia Ranbaxy Secures Marketing Approvals for 20 New Products

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Ipsen and Medicis Receives FDA Approval for Dysport...

Centocor Receives FDA Approval for Simponi...

Wyeth Receives FDA Approval for PRISTIQ™...

GSK Receives FDA Approval for Promacta®...

Cephalon Receives FDA Approval for TREANDA...  
Adolor Receives FDA Approval For Entereg(R)...  
Lundbeck Introduces Xenazine\* (Tetrabenazine) Tablets  
Eisai US Receives FDA Approval for Banzel™ (Rufinamide)  
Progenics Receives FDA Approval for RELISTOR...  
J&J Receives Approval for Anti-HIV Medication 'Intelence'...  
Sandoz Launches Generic Fluoxetine Hydrochloride Capsules in US  
Sandoz Introduces Eplerenone Tablets  
Wockhardt Introduces Midazolam Injection in the US  
Dr. Reddy's Announces Launch of Generic Version of Imitrex® Tablets  
Arbor Pharmaceuticals Debuts NEOTIC™ for Middle- Ear Infections  
Promius Pharma Introduces EpiCeram® Emulsion  
Sandoz Unveils Generic Variant of Imitrex® Injection  
Dr. Reddy's Launches Redihaler™ and Combihale™  
Wyeth Launches Antihemophilic Factor, XYNTHA™  
Bayer Schering Releases YAZ®  
Mylan Introduces Nisoldipine ER Tablets in US  
Ranbaxy Launches Generic Omeprazole in US  
Ranbaxy Unveils Generic Equivalent of Amlodipine Tablets  
Teva Unveils Generic Equivalent of Lamictal® Tablets  
Eisai and Helsinn Healthcare Introduce ALOXI® Injection for Prevention of PONV  
Janssen and Patriot Unveil Authorized Generic Equivalent for Risperdal®  
Watson Releases Generic Equivalent of MARINOL®  
Sandoz Introduces Generic Form of Altace®  
Abbott Introduces Aluvia® Tablet in South Africa  
Dr. Reddy's Rolls-out Atacor-R  
Sandoz Unveils Generic Form of Maxipime®  
Tibotec Therapeutics Introduces New 600mg Dosage Strength for PREZISTA  
Ranbaxy Pioneers Launch of New Bio-Generic Recombinant Osteoporosis Injection  
Sandoz Introduces Generic Variant of Antizol® Injection  
Sun Pharmaceuticals Introduces Injection of Amifostine  
Sandoz Re-Launches Generic Form of Bactocill® Injection  
Sandoz Introduces Generic Form of Cipro® Injection  
Merck Serono Introduces Cyanokit® in Japanese Market  
Ranbaxy Launches INERSAN Tablets in India and Nepal  
Sandoz Launches Omnitrope™ Pen 5 with Liquid Cartridge  
Endo Pharmaceuticals to Introduce OPANA® ER in Three Dosage Strengths  
Sandoz Releases Generic Form of Camptosar®  
Sun Pharmaceuticals Unveils Pantoprazole Sodium DR Tablets

Dr. Reddy's Introduces Supanac®  
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GSK Announces FDA approval of Altabax™...  
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Pfizer Receives FDA Approval for Selzentr...  
Ortho-McNeil Receives Approval for DORIBAX™...  
Merck Receives Approval for Isentress® ...  
BMS Wins FDA Approval for IXEMPRA™...  
Novartis' Tasigna® Receives FDA Approval...  
Mylan Receives FDA Approval for Bystolic...  
Roche's Mircera Secures FDA Approval...  
Eisai Launches New Dose Formulations of Aricept® Tablets in Japan  
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Sandoz Releases Generic Form of Delestrogen® Injections  
Sanofi and UCB Roll Out XYZAL® in US  
Sandoz Expands Range of Generic Augmentin® Drugs  
Sandoz Releases Generic Variant of Biaxin® for Oral Suspension  
Sandoz Introduces Generic Form of Penlac® Topical Solution  
Teva Releases Famciclovir Tablets  
Ranbaxy Introduces Roliflo OD in India  
Sandoz Introduces Generic Form of Toprol XL® 50Mg Extended Release Tablet  
Dr. Reddy's Introduces Glimy MP1 and Glimy MP2  
Sandoz Launches Approved Generic Equivalent of Lamisil®  
Ranbaxy Introduces Pravastatin Sodium 80mg Tablets in the US  
AstraZeneca Announces the Availability of Symbicort® pMDI  
Chugai and Maruho Announce the Launch of Oxarol® Lotion  
Ajinomoto and Eisai Jointly Launch 'Actonel® 17. 5mg Tablets'  
Sandoz Introduces Approved Generic Form of Lotrel®  
Dr. Reddy's Launches Ultravex™  
Wockhardt Unveils Zolpidem Tablets in the US  
Dr. Reddy's Introduces Reditux™  
Dr. Reddy's Secures Approval for Launching Zolpidem Tartrate Tablets  
Cipla Introduces Virenza Inhalation Capsules in India  
Ranbaxy Introduces Osovair in India



GlaxoSmithKline Introduces Coreg CR™  
Chugai Announces the Launch of Antiviral Agent, Copegus® Tablet  
Ranbaxy Unveils Generic Atorvastatin in Denmark  
Barr Unveils Generic 'PROSCAR®' Tablets  
Ranbaxy Introduces Niftran 100mg Capsules and Eligard 22. 5mg and 45mg  
Barr Releases METAGLIP™ Tablets  
SkinMedica Rolls Out Single-Dosage NeoBenz® Micro SD for Treating Acne  
Teva Rolls Out Generic Equivalent of Wellbutrin XI® Tablets  
Takeda Launches Takepron® I.V for Injection 30mg  
Takeda Launches duetact™ Combination Drug in USA  
Teijin Pharma Launches Bonalon® Tablet for Treating Osteoporosis

## **11. FOCUS ON SELECT GLOBAL PLAYERS**

Abbott Laboratories (USA)  
Allergan, Inc. (USA)  
Amgen, Inc. (USA)  
AstraZeneca (UK)  
Bayer AG (Germany)  
Bristol-Myers Squibb (USA)  
Boehringer Ingelheim Group (Germany)  
Dr. Reddy's Laboratories Ltd. (India)  
Eli Lilly and Company (USA)  
F. Hoffmann-La Roche Ltd. (Switzerland)  
Genentech, Inc. (USA)  
GlaxoSmithKline Plc (UK)  
Johnson & Johnson, Inc. (USA)  
Merck & Co. Inc. (USA)  
Merck Serono International S.A. (Switzerland)  
Mylan, Inc. (USA)  
Novartis AG (Switzerland)  
Pfizer, Inc. (USA)  
Ranbaxy Laboratories Limited (India)  
Sanofi-Aventis SA (France)  
Sanofi Pasteur (France)  
Takeda Pharmaceutical Company Limited (Japan)  
Teva Pharmaceutical Industries Ltd. (Israel)  
Watson Pharmaceuticals, Inc. (USA)  
Wyeth (USA)

## 12. GLOBAL MARKET PERSPECTIVE

**Table 25.** World Recent Past, Current & Future Analysis for Prescription Drugs Market by Geographic Region – US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015 (includes corresponding Graph/Chart)

**Table 26.** World Historic Review for Prescription Drugs Market by Geographic Region – US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets Independently Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

**Table 27.** World 15-year Perspective for Prescription Drugs Market by Geographic Region – Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, Latin America and Rest of World Markets for Years 2003, 2009 & 2015 (includes corresponding Graph/Chart)

**Table 28.** World Recent Past, Current & Future Analysis for Prescription Drugs Market by Therapeutic Class – Oncologics, Lipid Regulators, Respiratory Agents, Proton Pump Inhibitors, Antidiabetics, Antipsychotics, Antidepressants, Angiotensin II Antagonists, Anti-Epileptics, Autoimmune Agents and Others Markets Independently Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015 (includes corresponding Graph/Chart)

**Table 29.** World Historic Review for Prescription Drugs Market by Therapeutic Class – Oncologics, Lipid Regulators, Respiratory Agents, Proton Pump Inhibitors, Antidiabetics, Antipsychotics, Antidepressants, Angiotensin II Antagonists, Anti-Epileptics, Autoimmune Agents and Others Markets Independently Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

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### III. MARKET

#### 1. THE UNITED STATES

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Generics in the US

Biologics Post Highest Growth

Leading Prescription Drugs in the US

**Table 31.** Leading Prescription Drugs in the US by Value Sales (2008) in US\$ Billion - Lipitor, Nexium, Plavix, Advair Diskus, Seroquel, Singulair, Enbrel, Neulasta, Actos and Epogen (includes corresponding Graph/Chart)

Leading Therapeutic Classes in the US

**Table 32.** US Leading Therapeutic Classes by Revenue (2006-2008): Revenues for Antipsychotics, Lipid Regulators, Proton Pump Inhibitors, Seizure Disorders, Anti-Depressants, Angiotensin II Antagonists, Antineoplastic Monoclonal Antibodies, Erythropoietins, Anti-Arthritics and Oral Antiplatelets (in US\$ Billion) (includes corresponding Graph/Chart)

**Table 33.** US Leading Therapeutic Classes by Dispensed Prescriptions (2006-2008): Percentage Share Breakdown for Lipid Regulators, Contraceptives & Combinations, Anti-Depressants, ACE Inhibitors, Beta Blockers, Proton Pump Inhibitors, Seizure Disorders, Synthetic Thyroid Hormones, Calcium Blockers, Benzodiazepines, and Others (includes corresponding Graph/Chart)

Leading Players

**Table 34.** Leading Companies in the US Pharmaceutical Market (2006-2008): Percentage Breakdown of Value Sales for Pfizer, GlaxoSmithKline, Merck & Co., Johnson & Johnson, AstraZeneca, Amgen, Novartis, Hoffman-La Roche, Sanofi-Aventis, Eli Lilly and Others (includes corresponding Graph/Chart)

**Table 35.** US Pharmaceutical Market (2006-2008): Percentage Breakdown of

Dispensed Prescriptions for Teva Pharmaceuticals, Mylan Laboratories, Novartis, Watson Pharma, Pfizer, Barr Laboratories, Merck & Co., Mallinckrodt, Apotex, Qualitest, and Others (includes corresponding Graph/Chart)

Prescription Drug Spending

**Table 36.** Healthcare Spending in the US by Sector (2006) (includes corresponding Graph/Chart)

Increasing Share of Government in Prescription Drug Spending

**Table 37.** US Prescription Pharmaceutical Industry (2005 and 2006): Percentage Breakdown of Prescription Pharmaceutical Spending by Source for Private Insurance, Medicare, Medicaid, Out-of-Pocket and Other Public Spending (includes corresponding Graph/Chart)

Medicare Part D

Drug Price Regulations in the US

Pharmaceutical Marketing – A High Investment Area in the US

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Major Distribution Channels

**Table 39.** Major Prescription Drugs' Distribution Channels in the US by Dispensed Prescriptions (2006-2008): Percentage Share Breakdown for Chain Stores, Independent Stores, Food Stores, Long-term Care, and Mail Order (includes corresponding Graph/Chart)

**Table 40.** Major Prescription Drugs' Distribution Channels in the US by Value Sales (2006-2008): Percentage Breakdown for Distribution Channel for Chain Stores, Mail Order, Independent Stores, Clinics, Non-government Hospitals, Food Stores and Other Channels (includes corresponding Graph/Chart)

Fewer Product Launches

Generic Penetration and PBMs Moderate Prescription Drug Price Growth

Co-payment Differentials to Increase Generic Substitution

High Prescription Drug Costs Drive Drug Re- Importation

Direct-to-Consumer Advertising

The 2006 Revision of Package Insert Format

Other Initiatives

Role of PBMs in the Pharmaceutical Supply Chain

Prescription Drug Pricing in US

Role of Mail-Order Pharmacies in Cost Containment

Product Launches

Strategic Corporate Developments

Select Key Players

## **B. MARKET ANALYTICS**

**Table 41.** US Recent Past, Current & Future Analysis for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015 (includes corresponding Graph/Chart)

**Table 42.** US Historic Review for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

**Table 43.** US Recent Past, Current & Future Analysis for Prescription Pharmaceuticals by Therapeutic Class – Antipsychotics, Lipid Regulators, Proton Pump Inhibitors, Seizure Disorder Drugs, Anti-Depressants, Angiotensin II Antagonists, Antineo Monoclonal Antibodies, Erythropoietins, Others, Market Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015 (includes corresponding Graph/Chart)

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Antagonists, Antineo Monoclonal Antibodies, Erythropoietins, and Others for Years 2003, 2009 & 2015 (includes corresponding Graph/Chart)

## **2. CANADA**

### **A. MARKET ANALYSIS**

Current and Future Analysis

Leading Drugs

**Table 46.** Leading Prescription Drugs in Canada in Terms of Number of Dispensed Prescriptions (2006 and 2007) in Million Scripts: Lipitor, Synthroid, Norvasc, Asaphen, Pantoloc, Crestor, Altace, Ratio-Salbutamol Hfa, Novo-Venlafaxine XR and Apo-Furosemide (includes corresponding Graph/Chart)

Major Therapeutic Classes

**Table 47.** Leading Therapeutic Classes in Canada in terms of Dispensed Prescription (2006 and 2007): Percentage Breakdown of Cardiovascular, Antipsychotics, Gastrointestinal/Genitourinary, Lipid Regulators, Hormones, Systemic Anti-infective, Analgesics, Diabetes Therapy, Diuretics, Neurological Disorders and Others (includes corresponding Graph/Chart)

Prescription Drugs Spending on the Rise

Private Sector Insurance Continues to Gain Popularity

Canadian Prescription Drugs Market- A Comparison with the US

Generic Sales to Outpace Branded Drugs Sales

Generics Market in Canada

Generics to Offer Potential Cost Savings

New Patented Drugs- Adding Costs but Little Value

Two-level Drug Approval Process in Canada

Policy Differences Affect Generic Substitution Among Provinces

Applied and Other Research Take Major Chunk of R&D Investments in Canada

**Table 48.** Investments in Research & Development in Canada (1998, 2001, 2004 and 2007): Percentage Breakdown by Research Type- Applied Research, Basic Research

and Other Research Areas (includes corresponding Graph/Chart)

Product Launches

Strategic Corporate Developments

## **B. MARKET ANALYTICS**

**Table 49.** Canadian Recent Past, Current & Future Analysis for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015 (includes corresponding Graph/Chart)

**Table 50.** Canadian Historic Review for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

## **3. JAPAN**

### **A. MARKET ANALYSIS**

Current and Future Analysis

Generics Promotion in Japan

Ageing Population – A Prime Target

Competitive Landscape

**Table 51.** Leading Pharmaceutical Companies in Japan (2008): Percentage Breakdown of Revenues for Takeda Pharmaceuticals, Astellas Seiyaku, Dai-ichi Sankyo, Mitsubishi Tanabe, Chugai Seiyaku, Pfizer, Novartis, Eisai, GlaxoSmithKline and Otsuka Seiyaku (includes corresponding Graph/Chart)

**Table 52.** Leading Prescription Drugs in Japan (2006 and 2007): Value Sales in US\$ Million for Blopress, Diovan, Norvasc, Lipitor, Aricept, Epogin, Takepron, Leuplin, Micardis and Amlodin (includes corresponding Graph/Chart)

Cancer Drugs to Witness Robust Growth

Biennial Price Reduction to Impact Markets of Key Therapeutic Classes

Product Launches

Strategic Corporate Developments



Select Key Players

## **B. MARKET ANALYTICS**

**Table 53.** Japanese Recent Past, Current & Future Analysis for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015 (includes corresponding Graph/Chart)

**Table 54.** Japanese Historic Review for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

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### **A. MARKET ANALYSIS**

Current and Future Analysis

Pharmaceutical Spending on the Rise

Mounting Healthcare Bills Boost Generic Drugs Consumption

Biogenerics Foray into Europe

SNRIs Likely to Replace SSRIs

Research and Development

**Table 55.** European Investments in Pharma Research & Development: 2005-2007 (includes corresponding Graph/Chart)

Europe - The Research and Production Hub for Vaccines Worldwide

Parallel Trade in Europe

New Rules to Offer Respite to Parallel Traders

Manufacturers Seek Greater Control Over Supply Chain

Pharmaceutical Industry Overview In Select Countries

France

Germany

Generics

Exports

Production

Prices



New Molecular Entities  
R&D Investments  
Parallel trade  
Genetically Manufactured Drugs

**Table 56.** German Genetically Manufactured Pharmaceuticals (2007): Percentage Breakdown of Sales by Type - Vaccines, Insulins, Interferons, Monoclonal Antibodies, Erythropoietin, and Others (includes corresponding Graph/Chart)

United Kingdom  
Spain  
Cost Containment Efforts  
Increased Promotion for Generics  
Re-launch of Reference Price System  
Distribution  
Italy  
Generics Gain Traction  
Sweden  
Greece  
Unique Pricing Model for Drugs  
Product Launches  
Strategic Corporate Developments  
Select Key Players

## **B. MARKET ANALYTICS**

**Table 57.** European Recent Past, Current & Future Analysis for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015 (includes corresponding Graph/Chart)

**Table 58.** European Historic Review for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

## **5. ASIA-PACIFIC**

### **A. MARKET ANALYSIS**

## Current and Future Analysis

### Overview of Pharmaceutical Industries in Select Countries

#### India

##### Competitive Advantage

##### Number of FDA Approved Plants in India Vis-à-Vis Other Countries

##### Increasing Disposable Income Driving Consumption of Drugs

##### Generics to Surge Growth in Exports

##### Manufacturers Continue to Target Developed Markets

##### India to Emerge as an Important Pharmaceutical Manufacturing Center

##### Threat from Other Asian Countries

##### India to Emerge as a Major Hub for Biogenerics

##### Acute Therapy Class Leads the Market

**Table 59.** Leading Therapeutic Categories in the Indian Pharmaceutical Industry- Percentage Share Breakdown of Value Sales for Anti-infectives, Gastrointestinal, Cardiovascular, Respiratory, Minerals and Vitamins, Analgesics, Women's Health, Central Nervous System, Dermatology, and Others (includes corresponding Graph/Chart)

#### Increase in Private Healthcare Services

#### China

##### Chinese Pharma Industry Remains Immune to Global Crisis, for Now

##### Issues and Trends

##### Pharmaceutical Firms to Play Pivotal Role in Transforming Healthcare System

##### Brand Name Drugs to Exhibit Fastest Growth, While Generics Continue to Lead

##### Generics in China

##### Traditional Medicines – Substantial Share

**Table 60.** Leading Medicine Types in China (2005): Percentage share for Allopathic Medicines, Traditional Chinese Medicines (TCM), and Other Drugs (includes corresponding Graph/Chart)

#### Underserved Markets Prompt Government to Foster Development

##### Domestic EPO Market Booming, Domestic Players Continue their Domination

##### Chinese Antipsychotics Market to Witness Substantial Growth

##### Antidepressant Drugs to Exhibit Robust Sales

Indonesia

Market Features

Government-Enforced Pricing Control Over Essential Drugs

Distribution

Korea

Patent Expiries of Leading Drugs in South Korea: 2008 and 2009

Malaysia

Foreign Investments on the Rise

Domestic Market

Australia

Pharmaceutical Benefits Scheme

Government's Industry Development Programs

Outlook

Product Launches

Strategic Corporate Developments

Select Key Players

## **B. MARKET ANALYTICS**

**Table 61.** Asia-Pacific Recent Past, Current & Future Analysis for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015 (includes corresponding Graph/Chart)

**Table 62.** Asia-Pacific Historic Review for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

## **6. LATIN AMERICA**

### **A. MARKET ANALYSIS**

Current and Future Analysis

Strategic Corporate Developments

### **B. MARKET ANALYTICS**

**Table 63.** Latin American Recent Past, Current & Future Analysis for Prescription Drugs

Market Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015  
(includes corresponding Graph/Chart)

**Table 64.** Latin American Historic Review for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

## **7. REST OF WORLD**

### **A. MARKET ANALYSIS**

Current and Future Analysis  
Product Launches  
Strategic Corporate Developments

### **B. MARKET ANALYTICS**

**Table 65.** Rest of World Recent Past, Current & Future Analysis for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2006 through 2015  
(includes corresponding Graph/Chart)

**Table 66.** Rest of World Historic Review for Prescription Drugs Market Analyzed with Annual Sales in US\$ Billion for Years 2001 through 2005 (includes corresponding Graph/Chart)

## **IV. COMPETITIVE LANDSCAPE**

Total Companies Profiled: 292 (including Divisions/Subsidiaries - 360)  
Region/CountryPlayers  
The United States  
Canada  
Japan  
Europe  
France  
Germany  
The United Kingdom  
Italy  
Rest of Europe

Asia-Pacific (Excluding Japan)

Latin America

Africa

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