

**Best Export Market
for
U.S. Drugs/ & Pharmaceuticals, 2005**

Best Export Markets for U.S. Drugs/Pharmaceuticals was compiled by Cristiane Fonseca, under the supervision of Maurice Kogon, Director of the El Camino College Center for International Trade Development (CITD) in Hawthorne, California. The report is based largely on 2005 Country Commercial Guides (CCGs) prepared by United States Commercial Service (USCS) posts abroad. All CCGs include a standard chapter “Leading Sector for U.S. Exports.” This report drew from those CCGs which specifically recommended **Drugs & Pharmaceuticals** as a best prospect for U.S. exports.

The entire report is also available as a Word document, in print or electronically, for \$25.00. To order, contact the El Camino College CITD at: 310-973-3173 or mkogon@elcamino.edu.

CENTER FOR INTERNATIONAL TRADE DEVELOPMENT
13430 Hawthorne Blvd, Hawthorne, California 90250 USA
<http://elcamino.citd.org>

Phone: (310) 973-3173 Fax: (310) 973-3132 E-mail: mkogon@elcamino.edu.

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I. EXPORT MARKET OVERVIEW

A. HS 3002: Human & Animal Blood, Prepared; Antisera Other Blood Frctns Med Immunological Prod; Vaccines, Txns, Cultures of Micro-Organisms & Like Prod.

This Market Brief provides an overview of the world market for products falling within one category of the Drugs & Pharmaceuticals sector (HS 3002), based on an analysis of the latest trade statistics and market research.

Export Growth: U.S exports of HS 3002 products rose from \$2.3 billion in 2001 to \$4.5 billion in 2004, an increase of 91.2% over the four-year-period.

Leading Export Markets: The Netherlands is by far the leading market for U.S. exports of products in the HS 3002 category (\$1.4 billion in 2004, or 31.4% of total). Other top markets (all valued above \$144 million) were: Belgium (13.6%), Canada (8.3%), Switzerland (7.2%), United Kingdom (6.4%), Japan (6.2%), Germany (4.7%), and Austria (3.2%).

Fastest Growing Markets: The leading markets with both high and sustained growth rates for U.S. exports of HS 3002 products over the latest four years (2001-04 and 2003-04) were: Netherlands, Belgium, Canada, Switzerland, United Kingdom, and Japan. Dominican Rep. (+242.1%), Egypt (+138.5%), Australia (+123.2%), Other (smaller-volume) high-growth markets over the for-year period were: Ireland, France, Turkey, and Dominican Republic.

Leading Importing Countries: The top foreign importers of **Pharmaceuticals (SITC 541)** in 2004 were Germany (\$8.6 billion, or 15.4% of total), France (4.3%), Italy (3.8%), Switzerland (3.3%) and Belgium (2.8%). The top foreign importers of **Medicaments (SITC 542)** in 2004 were Belgium (\$28.9 billion, or 15.4% of total), Germany (9.4%), United Kingdom (6.9%), France (5.9%), Italy (4.5%), Switzerland (4.2%) and Netherlands (3.9%).

World Market Size & U.S. Share: Total world exports of **Pharmaceuticals (SITC 541)** by all countries reached \$59.4 billion in 2004, up from \$35.0 billion in 2001 (+69.8%). The U.S. had a 17.3% share of the total world market in 2004. Other world suppliers with significant market shares were Germany (15.3%), Switzerland (14.6%), Belgium (7.4%), Netherlands (5.5%) and France (5.3%). Total world exports of **Medicaments (SITC 542)** by all countries rose from \$96.7 billion in 2001 to \$184.3 billion in 2004 (+90.5%). The U.S. accounted for 7.1% of the total world market in 2004, topped by Belgium (14.3%), Germany (13.5%), United Kingdom (10.6%), France (9.5%), Ireland (8.9%), and Switzerland (7.8%).

Best Market Prospects: The markets listed below appear to be particularly promising for U.S. exports of Drugs/Pharmaceuticals over the next two years, based on recommendations of in-country USCS industry specialists. Specific U.S. export statistics on products in this category are available from the CITD for all countries, including those listed below (Source: U.S. Census Bureau). The CITD also has access to relevant trade contacts, trade opportunities and market research on each country:

:

- Austria
- Botswana
- Brazil
- Canada
- Greece
- Ireland
- Jamaica
- Japan
- Korea
- Lebanon
- Nepal
- Norway
- Philippines
- Russia
- Saudi Arabia
- Sweden
- Switzerland
- Thailand
- Ukraine
- United King.

I. EXPORT MARKET OVERVIEW

B. HS 3003: Medicaments (Except Vaccines Etc., Bandages Or Pharmaceuticals), Consisting Of Mixtures For Therapeutic Etc. Uses, Not In Dosage Or Retail Sale Form

This Market Brief provides an overview of the world market for products falling within one category of the Drugs & Pharmaceuticals sector (HS 3003), based on an analysis of the latest trade statistics and market research.

Export Growth: U.S exports of HS 3003 products rose from \$423 million in 2001 to \$1.2 billion in 2004, an increased of 192.6% over the four-year-period.

Leading Export Markets: Switzerland is by far the leading market for U.S. exports of products in the HS 3003 category (\$1.2 billion in 2004, or 40.4% of total). Other top markets (all valued above \$22 million) were: United Kingdom (11.8%), Spain (10.7%), Canada (6.8%), Ireland (4.1%), Mexico (3.3%), Italy (3.0%), and France (1.8%).

Fastest Growing Markets: The leading markets with both high and sustained growth rates for U.S. exports of HS 3003 products over the latest four years (2001-04 and 2003-04) were: Switzerland, United Kingdom, Spain, Canada, Mexico, and Italy. Other (smaller-volume) high-growth markets over the four-year period were: Norway, Belgium, and Korea.

Leading Importing Countries: The top foreign importers of **Pharmaceuticals (SITC 541)** in 2004 were Germany (\$8.6 billion, or 15.4% of total), France (4.3%), Italy (3.8%), Switzerland (3.3%) and Belgium (2.8%). The top foreign importers of **Medicaments (SITC 542)** in 2004 were Belgium (\$28.9 billion, or 15.4% of total), Germany (9.4%), United Kingdom (6.9%), France (5.9%), Italy (4.5%), Switzerland (4.2%) and Netherlands (3.9%).

World Market Size & U.S. Share: Total world exports of **Pharmaceuticals (SITC 541)** by all countries reached \$59.4 billion in 2004, up from \$35.0 billion in 2001 (+69.8%). The U.S. had a 17.3% share of the total world market in 2004. Other world suppliers with significant market shares were Germany (15.3%), Switzerland (14.6%), Belgium (7.4%), Netherlands (5.5%) and France (5.3%). Total world exports of **Medicaments (SITC 542)** by all countries rose from \$96.7 billion in 2001 to \$184.3 billion in 2004 (+90.5%). The U.S. accounted for 7.1% of the total world market in 2004, topped by Belgium (14.3%), Germany (13.5%), United Kingdom (10.6%), France (9.5%), Ireland (8.9%), and Switzerland (7.8%).

Best Market Prospects: The markets listed below appear to be particularly promising for U.S. exports of Drugs/Pharmaceuticals over the next two years, based on recommendations of in-country USCS industry specialists. Specific U.S. export statistics on products in this category are available from the CITD for all countries, including those listed below (Source: U.S. Census Bureau). The CITD also has access to relevant trade contacts, trade opportunities and market research on each country:

- Austria
- Botswana
- Brazil
- Canada
- Greece
- Ireland
- Jamaica
- Japan
- Korea
- Lebanon
- Nepal
- Norway
- Philippines
- Russia
- Saudi Arabia
- Sweden
- Switzerland
- Thailand
- Ukraine
- United Kingdom

I. EXPORT MARKET OVERVIEW

C. HS 3004: Medicaments (Except Vaccines Etc., Bandages Or Pharmaceuticals), Of Products (Mixed Or Not) For Therapeutic Etc. Uses, In Dosage Or Retail Sale Form

This Market Brief provides an overview of the world market for products falling within one category of the Drugs & Pharmaceuticals sector (HS 3004), based on an analysis of the latest trade statistics and market research.

Export Growth: U.S exports of HS 3004 products rose from rose from \$8.6 billion in 2001 to \$12.3 billion in 2004, an increased of 43.7% over the four-year-period..

Leading Export Markets: Canada is the leading market for U.S. exports of products in the HS 3004 category (\$2 billion in 2004, or 16.2% of total), followed by Netherlands (14.3%), United Kingdom (13.8%), and Belgium (8.8%). Other top markets (all valued above \$462 million) were: France (7.9%), Ireland (4.3%), Japan (4.2%), and Switzerland (3.7%).

Fastest Growing Markets: The leading markets with both high and sustained growth rates for U.S. exports of HS 3003 products over the latest four years (2001-04 and 2003-04) were: Canada, Netherlands, Belgium, France, Ireland, Japan, Switzerland, Mexico, Australia, Brazil, Spain, Denmark.

Leading Importing Countries: The top foreign importers of **Pharmaceuticals (SITC 541)** in 2004 were Germany (\$8.6 billion, or 15.4% of total), France (4.3%), Italy (3.8%), Switzerland (3.3%) and Belgium (2.8%). The top foreign importers of **Medicaments (SITC 542)** in 2004 were Belgium (\$28.9 billion, or 15.4% of total), Germany (9.4%), United Kingdom (6.9%), France (5.9%), Italy (4.5%), Switzerland (4.2%) and Netherlands (3.9%).

World Market Size & U.S. Share: Total world exports of **Pharmaceuticals (SITC 541)** by all countries reached \$59.4 billion in 2004, up from \$35.0 billion in 2001 (+69.8%) .The U.S. had a 17.3% share of the total world market in 2004. Other world suppliers with significant market shares were Germany (15.3%), Switzerland (14.6%), Belgium (7.4%), Netherlands (5.5%)and France (5.3%). Total world exports of **Medicaments (SITC 542)** by all countries rose from \$96.7 billion in 2001 to \$184.3 billion in 2004 (+90.5%).The U.S. accounted for 7.1% of the total world market in 2004, topped by Belgium (14.3%), Germany (13.5%), United Kingdom (10.6%), France (9.5%), Ireland (8.9%), and Switzerland (7.8%).

Best Market Prospects: The markets listed below appear to be particularly promising for U.S. exports of Drugs/Pharmaceuticals over the next two years, based on recommendations of in-country USCS industry specialists. Specific U.S. export statistics on products in this category are available from the CITD for all countries, including those listed below (Source: U.S. Census Bureau). The CITD also has access to relevant trade contacts, trade opportunities and market research on each country:

- Austria
- Botswana
- Brazil
- Canada
- Greece
- Ireland
- Jamaica
- Japan
- Korea
- Lebanon
- Nepal
- Norway
- Philippines
- Russia
- Saudi Arabia
- Sweden
- Switzerland
- Thailand
- Ukraine
- United Kingdom

II. MARKET POTENTIAL INDICATORS

A. Top 30 U.S. Export Markets for Drugs/Pharmaceuticals, 2001-04, by Country. These tables show the leading and fastest growing markets for U.S. products in the specified categories over the past several years. Source: U.S Census Bureau.

1. **HS 3002:** Human And Animal Blood, Prepared; Antisera Other Blood Frctns Med Immunological Prod; Vaccines, Txns, Cultures Of Micro-Organisms (No Yeast) & Like Prod.
2. **HS 3003:** Medicaments (Except Vaccines Etc., Bandages Or Pharmaceuticals), Consisting Of Mixtures For Therapeutic Etc. Uses, Not In Dosage Or Retail Sale Form
3. **HS 3004:** Medicaments (Except Vaccines Etc., Bandages Or Pharmaceuticals), Of Products (Mixed Or Not) For Therapeutic Etc. Uses, In Dosage Or Retail Sale Form

B. Top 30 World Importers: Drugs/Pharmaceuticals 2001-2004, by Country. These tables show the leading and fastest growing world importers of products in the specified categories. Source: United Nations COMTRADE.

1. **SITC 541: Pharmaceuticals Except Medicaments**
2. **SITC 542: Medicaments Include Vet**

C. Top 30 World Exporters & U.S. Share: Drugs/Pharmaceuticals, 2001-2004, by Country. These tables show the U.S. and competitor-country shares of total world exports of products in the specified categories. Source: United Nations COMTRADE.

1. **SITC 541**
2. **SITC 542**

D. Market Sizes & U.S. Share: Drugs/Pharmaceuticals, 2003-04, by Country. This table shows each “best prospect” country’s total market, total imports, imports from the U.S., and the U.S. market share for products in this sector. Source: U.S. Commercial Staff in each country.

II. Market Potential Indicators

A. Top 30 U.S. Export Markets 2001-2004 (Values in \$1,000s)

1. HS 3002: Human & Animal Blood, Prepared; Antisera Other Blood Frctns Med Immunological Prod; Vaccines, Txns, Cultures Of Micro-Organisms (No Yeast), etc.

Country	2001	2002	2003	2004	% Change	% Change	% Share
	<i>In 1,000 Dollars</i>				2001-04	2003-04	2004
Netherlands	66,975	300,940	790,580	1,401,192	1992.11%	77.20%	31.36%
Belgium	319,130	515,888	520,870	607,628	90.40%	16.70%	13.60%
Canada	217,686	256,392	334,575	371,800	70.80%	11.10%	8.32%
Switzerland	139,098	148,411	266,507	323,830	132.81%	21.50%	7.25%
United Kingdom	171,161	119,832	165,513	288,469	68.54%	74.30%	6.46%
Japan	250,808	243,710	232,493	280,918	12.01%	20.80%	6.29%
Germany	220,843	208,946	241,636	213,823	-3.18%	-11.50%	4.79%
Austria	148,297	188,990	143,733	144,660	-2.45%	0.60%	3.24%
Spain	176,699	95,126	137,076	128,451	-27.31%	-6.30%	2.88%
Australia	32,634	44,007	78,998	72,844	123.22%	-7.80%	1.63%
France	60,034	79,050	61,950	65,334	8.83%	5.50%	1.46%
Italy	59,955	57,382	46,784	58,928	-1.71%	26.00%	1.32%
Korea	60,977	56,301	52,542	53,153	-12.83%	1.20%	1.19%
Mexico	49,616	51,778	51,713	51,269	3.33%	-0.90%	1.15%
Ireland	11,094	21,719	33,515	38,740	249.20%	15.60%	0.87%
Brazil	32,373	40,196	33,135	30,920	-4.49%	-6.70%	0.69%
Taiwan	39,298	46,506	50,140	30,005	-23.65%	-40.20%	0.67%
Turkey	15,084	10,613	15,361	20,905	38.59%	36.10%	0.47%
Egypt	6,703	6,351	5,401	15,987	138.51%	196.00%	0.36%
Dominican Rep	4,395	2,919	2,471	15,036	242.12%	508.60%	0.34%
China	10,106	15,687	20,250	14,835	46.79%	-26.70%	0.33%
Israel	12,611	11,395	13,666	14,830	17.60%	8.50%	0.33%
Thailand	11,337	10,071	13,199	13,970	23.22%	5.80%	0.31%
Colombia	8,208	9,497	12,477	11,674	42.23%	-6.40%	0.26%
Venezuela	13,014	8,868	6,542	11,402	-12.39%	74.30%	0.26%
Sweden	25,650	54,210	48,846	11,325	-55.85%	-76.80%	0.25%
Saudi Arabia	20,081	8,094	13,454	9,944	-50.48%	-26.10%	0.22%
India	6,042	6,717	6,582	9,589	58.71%	45.70%	0.21%
Hong Kong	8,908	7,674	7,824	8,883	-0.28%	13.50%	0.20%
Argentina	13,630	4,848	8,954	8,799	-35.44%	-1.70%	0.20%
Top 30 Subtotal:	2,212,447	2,632,119	3,416,787	4,329,140	95.67%	26.70%	96.90%
All Other:	123,779	116,974	149,469	138,525	11.91%	-7.30%	3.10%
Total	2,336,226	2,749,094	3,566,256	4,467,665	91.23%	25.30%	100.00%

.Source: U.S Census Bureau.

II. Market Potential Indicators

A. Top 30 U.S. Export Markets 2001-2004

(Values in \$1,000s)

2. HS - 3003: Medicaments (Except Vaccines Etc., Bandages Or Pharmaceuticals), Consisting Of Mixtures For Therapeutic Etc.

	2001	2002	2003	2004	%Change	% Change	% Share
Country	<i>In 1,000 Dollars</i>				2001-04	2003-04	2004
Switzerland	38,163	119,556	452,369	500,725	1212.07%	10.70%	40.41%
United Kingdom	18,757	36,989	84,182	145,983	678.29%	73.40%	11.78%
Spain	13,082	46,766	73,078	133,088	917.34%	82.10%	10.74%
Canada	63,722	58,590	62,401	84,518	32.64%	35.40%	6.82%
Ireland	77,015	73,214	51,293	51,436	-33.21%	0.30%	4.15%
Mexico	13,282	25,497	21,935	41,900	215.46%	91.00%	3.38%
Italy	3,989	8,472	22,797	37,664	844.20%	65.20%	3.04%
France	33,537	22,180	37,197	22,316	-33.46%	-40.00%	1.80%
Norway	2,143	90	15,234	21,102	884.69%	38.50%	1.70%
Australia	3,756	44,576	32,276	20,221	438.37%	-37.40%	1.63%
Japan	8,391	18,185	30,672	19,318	130.22%	-37.00%	1.56%
China	4,505	12,970	21,412	17,032	278.07%	-20.50%	1.37%
Belgium	2,954	4,191	6,889	13,332	351.32%	93.50%	1.08%
Germany	11,555	20,721	27,201	11,937	3.31%	-56.10%	0.96%
Korea	3,268	5,339	4,340	8,939	173.53%	106.00%	0.72%
Thailand	9,013	8,025	6,500	8,145	-9.63%	25.30%	0.66%
Saudi Arabia	10,998	6,523	6,191	8,114	-26.22%	31.00%	0.65%
Uruguay	719	615	1,397	7,893	997.77%	464.90%	0.64%
Turkey	6,006	4,204	4,421	7,659	27.52%	73.20%	0.62%
Greece	8,332	9,241	9,274	6,195	-25.65%	-33.20%	0.50%
Netherlands	30,498	37,223	39,172	6,141	-79.86%	-84.30%	0.50%
Panama	1,574	2,720	2,930	5,316	237.74%	81.50%	0.43%
Brazil	4,211	5,697	6,274	5,310	26.10%	-15.40%	0.43%
Israel	1,275	12,160	2,679	4,682	267.22%	74.80%	0.38%
Egypt	2,369	6,295	2,779	4,440	87.42%	59.80%	0.36%
Taiwan	2,105	4,253	2,464	4,316	105.04%	75.20%	0.35%
Pakistan	592	2,118	2,217	3,825	546.11%	72.60%	0.31%
Argentina	1,072	794	1,982	3,201	198.60%	61.50%	0.26%
Venezuela	3,106	1,568	2,092	2,644	-14.87%	26.40%	0.21%
Singapore	1,279	1,260	1,480	2,316	81.08%	56.50%	0.19%
Top 30 Subtotal:	381,269	600,031	1,035,129	1,209,709	217.28%	16.90%	97.62%
All Other:	42,183	39,178	30,764	29,525	-30.01%	-4.00%	2.38%
Total	423,451	639,209	1,065,893	1,239,234	192.65%	16.30%	100.00%

. Source: U.S Census Bureau.

II. Market Potential Indicators

A. Top 30 U.S. Export Markets 2001-2004 (Values in \$1,000s)

3. HS - 3004: Medicaments (Except Vaccines Etc., Bandages or Pharmaceuticals), of Products (Mixed or Not) For Therapeutic Etc.

Country	2001	2002	2003	2004	Percent Change	Percent Change	Percent Change
	<i>In 1,000 Dollars</i>				2001-04	2003-04	2004
Canada	1,569,768	1,696,184	1,972,906	1,994,511	27.06%	1.10%	16.23%
Netherlands	497,644	679,469	782,263	1,760,067	253.68%	125.00%	14.33%
United Kingdom	2,116,824	1,542,546	1,462,150	1,695,096	-19.92%	15.90%	13.80%
Belgium	412,116	754,297	946,297	1,084,361	163.12%	14.60%	8.83%
France	511,846	457,388	909,556	973,103	90.12%	7.00%	7.92%
Ireland	348,575	357,956	439,753	533,371	53.01%	21.30%	4.34%
Japan	410,626	446,902	467,682	524,910	27.83%	12.20%	4.27%
Switzerland	276,679	255,308	275,285	462,326	67.10%	67.90%	3.76%
Italy	423,852	446,410	550,887	392,689	-7.35%	-28.70%	3.20%
Mexico	233,065	242,487	293,911	386,036	65.63%	31.30%	3.14%
Australia	216,027	243,215	295,340	385,712	78.55%	30.60%	3.14%
Germany	351,472	199,234	286,745	285,502	-18.77%	-0.40%	2.32%
Brazil	154,299	192,957	198,159	257,202	66.69%	29.80%	2.09%
Spain	43,689	20,072	43,403	190,810	336.75%	339.60%	1.55%
Denmark	24,026	21,338	39,653	111,108	362.45%	180.20%	0.90%
Panama	83,399	61,622	87,497	100,231	20.18%	14.60%	0.82%
Argentina	73,551	42,930	53,879	87,249	18.62%	61.90%	0.71%
Taiwan	72,975	73,320	75,423	83,723	14.73%	11.00%	0.68%
Korea	41,864	45,380	61,710	82,658	97.44%	33.90%	0.67%
Israel	35,267	45,513	40,373	74,011	109.86%	83.30%	0.60%
Turkey	29,986	30,372	35,699	70,011	133.48%	96.10%	0.57%
Sweden	18,939	25,192	37,300	58,137	206.97%	55.90%	0.47%
China	32,451	42,150	39,766	52,309	61.19%	31.50%	0.43%
Saudi Arabia	45,798	43,491	38,539	44,723	-2.35%	16.00%	0.36%
Poland	26,668	29,348	34,153	43,721	63.95%	28.00%	0.36%
Colombia	17,830	19,180	19,987	42,089	136.06%	110.60%	0.34%
Hong Kong	34,467	33,554	25,974	33,151	-3.82%	27.60%	0.27%
South Africa	37,566	24,203	39,156	29,886	-20.44%	-23.70%	0.24%
Venezuela	25,280	18,667	10,978	24,695	-2.31%	125.00%	0.20%
Singapore	25,668	24,229	27,646	18,009	-29.84%	-34.90%	0.15%
Top 30 Subtotal:	8,192,216	8,114,914	9,592,069	11,881,408	45.03%	23.90%	96.71%
All Other:	359,341	319,641	361,280	404,348	12.52%	11.90%	3.29%
Total	8,551,557	8,434,555	9,953,349	12,285,756	43.67%	23.40%	100.00%

Source: U.S Census Bureau.

II. Market Potential Indicators

B. Top 30 World Importers, 2001-2004

1. SITC 541: Pharmaceuticals Except Medicaments

Importing Country	2001	2002	2003	2004	% Change	% Change	% Share
	<i>In 1,000 Dollars</i>				2001- 04	2003-04	2004
Germany	4,127,631	4,812,368	6,512,976	8,575,086	107.7%	31.7%	7.7%
USA	5,449,784	6,287,490	7,925,747	8,557,061	57.0%	8.0%	7.7%
France	3,189,113	3,744,363	4,110,189	4,797,368	50.4%	16.7%	4.3%
Italy	2,135,195	2,701,731	3,379,559	4,275,745	100.3%	26.5%	3.8%
Switzerland	2,762,342	2,966,035	3,430,764	3,650,277	32.1%	6.4%	3.3%
Belgium	1,781,261	2,287,850	2,905,360	3,138,354	76.2%	8.0%	2.8%
United Kingdom	1,575,923	1,870,480	2,270,504	2,840,479	80.2%	25.1%	2.5%
Netherlands	1,144,260	1,256,831	1,927,306	2,529,732	121.1%	31.3%	2.3%
Japan	2,108,846	2,245,772	2,219,381	2,343,108	11.1%	5.6%	2.1%
Spain	1,056,999	1,318,920	1,633,592	1,497,237	41.6%	-8.3%	1.3%
Canada	997,468	1,074,393	1,258,713	1,343,493	34.7%	6.7%	1.2%
Austria	697,502	870,595	1,019,135	991,988	42.2%	-2.7%	0.9%
Brazil	851,049	870,514	834,542	963,054	13.2%	15.4%	0.9%
Australia	510,933	510,534	729,752	816,064	59.7%	11.8%	0.7%
Mexico	648,273	695,967	759,608	797,325	23.0%	5.0%	0.7%
Turkey	460,597	511,619	626,875	777,134	68.7%	24.0%	0.7%
Ireland	387,134	490,900	583,018	670,273	73.1%	15.0%	0.6%
Korea Rep.	475,713	542,410	550,044	627,757	32.0%	14.1%	0.6%
China	345,931	471,729	497,804	549,002	58.7%	10.3%	0.5%
Sweden	278,622	352,329	449,923	499,491	79.3%	11.0%	0.4%
India	326,742	431,533	498,665	476,027	45.7%	-4.5%	0.4%
Poland	271,697	297,776	366,681	428,490	57.7%	16.9%	0.4%
Russian Fed	287,931	264,832	327,437	405,266	40.8%	23.8%	0.4%
Singapore	397,678	406,554	427,596	400,294	0.7%	-6.4%	0.4%
Greece	157,134	122,895	282,204	382,445	143.4%	35.5%	0.3%
Denmark	222,993	249,403	306,645	378,613	69.8%	23.5%	0.3%
Portugal	230,549	261,856	302,654	344,868	49.6%	13.9%	0.3%
Czech Rep	166,441	205,305	274,056	327,696	96.9%	19.6%	0.3%
Argentina	275,454	168,900	245,046	283,850	3.0%	15.8%	0.3%
Top 30 Subtotal	33,453,526	38,445,698	46,898,659	53,933,916	61.2%	15.0%	93.2%
Other Countries	37,298,346	42,247,059	51,250,064	57,876,519	55.2%	12.9%	51.8%
All Countries	70,751,872	80,692,757	98,148,723	111,810,435	58.0%	13.9%	100.0

Source: United Nations COMTRADE

II. Market Potential Indicators

B Top 30 World Importers, 2001-2004 2. SITC 542: Medicaments Include Vet

Importing Country	2001	2002	2003	2004	% Change 2001- 04	% Change 2003-04	% Share 2004
	<i>In 1,000 Dollars</i>						
Belgium	6,572,641	18,729,792	22,594,368	28,938,416	340.3%	28.1%	15.4%
USA	13,303,291	18,586,192	23,813,504	26,813,920	101.6%	12.6%	14.3%
Germany	6,553,259	12,616,964	14,187,612	17,671,344	169.7%	24.6%	9.4%
United Kingdom	7,602,521	9,464,010	11,422,372	12,969,604	70.6%	13.5%	6.9%
France	6,083,477	7,036,783	9,006,060	11,037,674	81.4%	22.6%	5.9%
Italy	4,923,961	6,052,396	7,441,944	8,523,883	73.1%	14.5%	4.5%
Switzerland	4,094,086	5,299,528	6,287,857	7,957,823	94.4%	26.6%	4.2%
Netherlands	3,735,729	4,823,566	5,043,544	7,367,835	97.2%	46.1%	3.9%
Spain	3,349,980	4,405,479	5,659,975	6,851,939	104.5%	21.1%	3.7%
Canada	3,319,122	3,822,295	4,895,174	5,611,127	69.1%	14.6%	3.0%
Japan	2,942,670	3,180,410	3,973,717	4,771,097	62.1%	20.1%	2.5%
Australia	1,874,346	2,319,149	2,867,962	3,975,493	112.1%	38.6%	2.1%
Russian Fed	1,579,046	1,362,242	2,042,423	2,525,818	60.0%	23.7%	1.3%
Greece	1,003,437	736,391	1,899,601	2,414,154	140.6%	27.1%	1.3%
Poland	1,620,235	1,801,470	2,054,419	2,412,327	48.9%	17.4%	1.3%
Turkey	884,731	1,205,564	1,675,246	2,258,324	155.3%	34.8%	1.2%
Austria	1,329,781	1,578,228	1,958,183	2,207,780	66.0%	12.7%	1.2%
Sweden	1,170,271	1,488,212	1,750,541	1,981,511	69.3%	13.2%	1.1%
Denmark	874,049	1,107,780	1,411,414	1,768,579	102.3%	25.3%	0.9%
Mexico	969,485	1,163,915	1,414,229	1,754,326	81.0%	24.0%	0.9%
Ireland	1,335,818	1,457,922	1,843,566	1,725,077	29.1%	-6.4%	0.9%
Portugal	849,284	1,041,429	1,346,347	1,640,218	93.1%	21.8%	0.9%
Czech Rep	724,758	862,794	1,179,709	1,517,718	109.4%	28.7%	0.8%
Finland	659,181	850,327	1,124,018	1,426,971	116.5%	27.0%	0.8%
China	871,597	962,379	1,207,828	1,350,306	54.9%	11.8%	0.7%
Hungary	532,482	661,484	945,897	1,259,357	136.5%	33.1%	0.7%
Saudi Arabia	864,881	910,395	1,256,774		-100.0%	-100.0%	0.0%
Brazil	1,059,129	1,060,336	1,051,544	1,234,627	16.6%	17.4%	0.7%
Korea Rep.	526,721	640,501	812,031	1,081,109	105.3%	33.1%	0.6%
Norway	628,433	796,949	948,549	1,033,395	64.4%	8.9%	0.6%
Top 30 Subtotal	81,838,402	116,024,88	143,116,408	172,081,75	110.3%	20.2%	91.7%
Other countries	13,309,199	13,236,486	15,131,730	15,608,305	17.3%	3.1%	8.3%
All Countries	95,147,601	129,261,36	158,248,138	187,690,05	97.3%	18.6%	100.0

Source: United Nations COMTRADE

II. Market Potential Indicators

C. Top 30 World Exporters & U.S. Market Share, 2001-2004

1. SITC 541: Pharmaceuticals Except Medicaments

Exporting Country	2001	2002	2003	2004	% Change	% Change	% Share
	<i>In 1,000 Dollars</i>				2001- 04	2003-04	2004
USA	6,339,196	6,939,857	8,056,545	10,311,124	62.7%	28.0%	17.3%
Germany	4,522,054	4,811,457	7,093,516	9,071,886	100.6%	27.9%	15.3%
Switzerland	4,863,419	6,062,336	6,976,822	8,680,263	78.5%	24.4%	14.6%
Belgium	2,463,777	3,243,301	4,155,311	4,384,119	77.9%	5.5%	7.4%
Netherlands	1,327,570	1,555,543	2,236,845	3,293,983	148.1%	47.3%	5.5%
France	2,042,474	2,362,453	2,897,535	3,121,395	52.8%	7.7%	5.3%
United Kingdom	1,904,101	2,227,587	2,620,263	2,847,009	49.5%	8.7%	4.8%
China	1,673,797	2,020,471	2,516,463	2,830,385	69.1%	12.5%	4.8%
Ireland	1,295,981	1,919,554	2,080,720	2,310,671	78.3%	11.1%	3.9%
Italy	1,485,886	1,476,570	1,942,705	1,913,601	28.8%	-1.5%	3.2%
Denmark	870,025	1,050,751	1,452,335	1,722,140	97.9%	18.6%	2.9%
Austria	674,083	902,889	1,144,720	1,323,851	96.4%	15.6%	2.2%
Spain	718,531	874,335	1,030,125	1,196,886	66.6%	16.2%	2.0%
Japan	1,003,852	1,094,509	1,029,821	1,139,814	13.5%	10.7%	1.9%
Sweden	262,548	354,641	476,088	848,451	223.2%	78.2%	1.4%
Singapore	680,107	624,625	586,733	709,967	4.4%	21.0%	1.2%
Canada	357,203	335,338	458,209	466,412	30.6%	1.8%	0.8%
India	368,828	469,812	537,130	464,628	26.0%	-13.5%	0.8%
Mexico	359,976	340,460	366,943	321,117	-10.8%	-12.5%	0.5%
Korea Rep.	204,683	213,913	212,928	263,873	28.9%	23.9%	0.4%
Australia	228,535	132,788	176,115	214,775	-6.0%	22.0%	0.4%
Czech Rep	107,462	120,688	157,941	205,274	91.0%	30.0%	0.3%
Hungary	59,134	42,378	103,122	188,299	218.4%	82.6%	0.3%
Norway	97,801	133,593	170,899	176,756	80.7%	3.4%	0.3%
Brazil	108,795	101,579	111,106	156,027	43.4%	40.4%	0.3%
Israel	62,595	92,541	115,617	150,606	140.6%	30.3%	0.3%
Croatia	94,125	115,141	105,692	126,261	34.1%	19.5%	0.2%
Finland	77,558	94,336	112,149	97,235	25.4%	-13.3%	0.2%
Poland	44,239	47,852	63,429	92,505	109.1%	45.8%	0.2%
Argentina	74,303	70,559	71,375	89,465	20.4%	25.3%	0.2%
Top 30 Subtotal	34,372,638	39,831,857	49,059,202	58,718,778	70.8%	19.7%	98.8%
Other Countries	635,755	583,986	751,036	717,783	12.9%	-4.4%	1.2%
All Countries	35,008,393	40,415,843	49,810,238	59,436,561	69.8%	19.3%	100.0%

Source: United Nations COMTRADE

II. Market Potential Indicators

C. Top 30 World Exporters & U.S. Market Share, 2001-2004

2. SITC: 542 - Medicaments Include Vet

Exporting Country	2000	2001	2002	2003	% Change	% Change	% Share
	<i>In 1,000 Dollars</i>				2000-03	2002-03	2003
Belgium	6,895,807	18,556,736	21,318,816	26,386,336	282.6%	23.8%	14.3%
Germany	13,532,415	12,019,236	16,491,605	24,958,656	84.4%	51.3%	13.5%
United Kingdom	11,105,142	12,932,860	16,740,685	19,579,696	76.3%	17.0%	10.6%
France	10,593,244	12,578,898	15,143,274	17,581,616	66.0%	16.1%	9.5%
Ireland	6,711,939	12,861,712	13,004,232	16,479,191	145.5%	26.7%	8.9%
Switzerland	8,596,084	9,808,412	11,762,759	14,346,984	66.9%	22.0%	7.8%
USA	8,804,511	8,781,659	10,707,472	13,024,083	47.9%	21.6%	7.1%
Italy	5,853,085	7,491,346	8,310,804	9,195,764	57.1%	10.6%	5.0%
Netherlands	3,599,785	4,826,136	5,606,569	7,237,440	101.1%	29.1%	3.9%
Sweden	3,906,457	4,251,485	6,106,352	6,354,397	62.7%	4.1%	3.4%
Denmark	2,506,298	2,766,723	3,395,761	3,853,194	53.7%	13.5%	2.1%
Spain	1,716,737	2,798,209	3,492,866	3,746,783	118.3%	7.3%	2.0%
Canada	1,093,119	1,214,912	1,881,678	2,522,726	130.8%	34.1%	1.4%
Japan	1,727,237	1,717,354	2,159,080	2,400,214	39.0%	11.2%	1.3%
India	979,393	1,290,198	1,484,375	1,825,562	86.4%	23.0%	1.0%
Austria	1,156,357	1,334,908	1,742,989	1,701,238	47.1%	-2.4%	0.9%
Australia	1,030,076	925,082	1,274,252	1,696,100	64.7%	33.1%	0.9%
Israel	575,852	834,859	843,735	1,208,876	109.9%	43.3%	0.7%
Mexico	725,647	831,100	888,246	1,109,516	52.9%	24.9%	0.6%
Slovenia	445,449	581,521	868,370	1,018,621	128.7%	17.3%	0.6%
Hungary	359,112	374,377	603,150	901,515	151.0%	49.5%	0.5%
Greece	302,877	260,912	617,572	833,885	175.3%	35.0%	0.5%
Finland	218,039	322,918	398,931	517,524	137.4%	29.7%	0.3%
Singapore	445,389	299,736	327,051	405,919	-8.9%	24.1%	0.2%
China	304,698	303,103	344,088	403,922	32.6%	17.4%	0.2%
Portugal	233,861	251,639	262,195	309,503	32.3%	18.0%	0.2%
Argentina	262,921	241,646	228,988	298,847	13.7%	30.5%	0.2%
Poland	131,809	155,318	170,842	278,886	111.6%	63.2%	0.2%
Czech Rep	154,762	146,604	188,050	275,609	78.1%	46.6%	0.1%
Norway	138,117	167,122	204,489	266,581	93.0%	30.4%	0.1%
Top 30 Subtotal	94,106,219	120,926,721	146,569,276	180,719,184	92.0%	23.3%	98.1%
Other countries	2,629,509	2,735,864	3,026,241	3,553,882	35.2%	17.4%	1.9%
All Countries	96,735,728	123,662,585	149,595,517	184,273,066	90.5%	23.2%	100.0%

Source: United Nations COMTRADE

II. Market Potential Indicators

D. Market Sizes & U.S. Share, by Country

The Table below provides comparative data on total market, import market, and import from the U.S. for 19 countries considered “best prospects” for U.S. exports of Drugs & Pharmaceuticals. The countries are listed in alphabetic order, not in rank order. The data are based on local sources and reflect best estimates of USCS commercial officers in each country. Statistical accuracy and comparability to other sources (e.g., “USDOC Bureau of Census”) are affected by a number of factors, including lack of published figures in certain markets, variances in data collection techniques, sources of data, and industry definitions.

High Potential Export Markets For U.S. Drugs/Pharmaceuticals Market Size By Country (Values in \$ Millions)

Country	Total Market			Total Imports			Imports from US			% U.S. Share
	2003	2004	% Change	2003	2004	% Change	2003	2004	% Change	2004
Austria	1,141.80	1,214	6.32%	2,854.30	2,940.00	3.00%	306.9	356.2	16.06%	12.1%
Botswana	295.5	357.8	21.08%	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Brazil.*	5,550	3,965	-28.56%	1,530	1,340	-12.42%	800	600	-25.00%	44.8%
Canada	10,126	11,655	15.10%	6,410	7,287	13.68%	3,030	3,206	5.81%	44.0%
Greece **	1,990	2,323	16.73%	2,088	2,436	16.67%	319	424	32.92%	17.4%
Ireland	3,355	3,690	9.99%	2,647	2,912	10.01%	532	585	9.96%	20.1%
Jamaica	97	97	0.00%	87	87	0.00%	45	45	0.00%	51.7%
Japan	67,630	69,227	2.36%	8,146	8,554	5.01%	1,622	1,703	4.99%	19.9%
Korea	7,163	7,944	10.90%	687	803	16.89%	87	100	14.94%	12.5%
Lebanon ***	375	410	9.33%	270	312	15.56%	18	20	11.11%	6.4%
Nepal	5	5	0.00%	4.46	3.89	-12.78%	0.64	0.99	54.69%	25.4%
Norway	1,530	1,760	15.03%	1,150	1,320	14.78%	105	120	14.29%	9.1%
Philippines	334	353	5.69%	355	375	5.63%	21	22	4.76%	5.9%
Russia	3,300	3,550	7.58%	2,289	2,390	4.41%	170	190	11.76%	7.9%
Sweden	2,929	3,496	19.36%	1,681	1,891	12.49%	54	60	11.11%	3.2%
Switzerland	13.1	13.49	2.98%	13.35	13.75	3.00%	4.03	4.19	3.97%	30.5%
Thailand	486	544	11.93%	192	205	6.77%	38	46	21.05%	22.4%
United King.	15,400	16,500	7.14%	8,200	9,300	13.41%	1,800	2,200	22.22%	23.7%
Ukraine	842	968	14.96%	530	623	17.55%	20	23	15.00%	3.7%

Note: The above statistics are unofficial estimates

*2002-2003

**2004-2005

***2001-2002

III. BEST-PROSPECT MARKET ASSESSMENTS

Following are overviews of “best prospect” markets for U.S Drugs/Pharmaceuticals, based on observations of USCS posts in each country. The countries appear in alphabetical order. For more detailed market research on Drugs/Pharmaceuticals in these and other specific markets, see industry Market Research Report listed in Chapter V. For general commercial and economic information on individual countries, see the relevant Country Commercial Guides (CCGs).

AUSTRIA

In 2004, Austrian production of pharmaceuticals grew 4% while imports grew 3% and exports grew 2.3%. More than half of all pharmaceuticals approved for sale in Austria are imported. Only about 40% are produced domestically. In 2003 196.2 million packages of pharmaceuticals were sold. The Austrian health-care system directly employs approximately 170,000 people. Another 180,000 are indirectly engaged in the industry.

Pharmaceutical expenditure in Austria accounts for about 10% of total health care spending. Around 70% of health-care spending is publicly financed. International comparison shows that drug consumption in Austria is significantly below the European average in both value and number of packages sold. Annual per capita consumption amounts to 22 packages valued at approximately \$250. Government cost containment legislation encourages sales of self-medication (OTC drugs and generic medicines). Self-medication accounts for about 10% of the market, placing Austria in the lower third in a ranking with other countries. Increased life expectancy and the growth in private health care insurance are expected to have a positive impact on the market.

In Austria the average price of the 500 best-selling medications, calculated according to the Paasche index, fell by 1.5% in 2003 below the 2002 average. Prices for medications already on the Austrian market have fallen on average more than 1% every year.

Access to the Austrian pharmaceutical market is subject to strict national or EU legislation. The approving authority is the Federal Ministry for Health and Women. Besides this national procedure, generic medicines and most other pharmaceutical preparations can be registered by a “decentralized registration procedure.” This procedure is governed by the principle of reciprocity, meaning that once approval has been granted by at least one EU member state, all other EU countries are, upon request, obliged to follow.

The Austrian pharmaceutical industry consists of subsidiaries of multinational companies and small- to medium-sized Austrian firms. Both groups have enjoyed above average growth in sales in recent years. Market leaders are Novartis, Glaxo Smith Kline, Baxter, Roche, Janssen & Cilag Pharma, and Merck Sharp Dohme.

Products from the U.S. enjoy an excellent reputation with respect to quality and safety. The Austrian market is very receptive to U.S. imports in this field. U.S. imports of drugs and

pharmaceuticals rank second only behind Germany, but they are ahead of France, the United Kingdom, and Switzerland. The leading category of medications from the U.S. is that category prescribed to treat cardiovascular illnesses. Medications for stomach and intestinal ailments, and for psychotherapy, follow in importance.

Best prospects are: Cancer medications; Cardiovascular medications; AIDS medications; Bio-technologically produced medications; and vitamin and mineral combinations such as Melatonin, DHEA, and St. John's Worth. These are classified as pharmaceuticals in Austria, not as dietary supplements as they are in the U.S.

BOTSWANA

Botswana is facing major challenges in stamping out health threats, such as HIV/AIDS, malaria and tuberculosis. In order to improve service delivery, the Botswana Government has attached high priority to manpower development through training of health care personnel. There is also a firm commitment to improve health care infrastructure and provide and upgrade medical and surgical equipment. Presently there is no pharmaceutical production capacity in Botswana.

The Health sector has been allocated the third largest (11%) share of the national development budget. The Government of Botswana's Ministry of Health is planning a series of infrastructure improvements and equipment upgrades, including improvements to several district medical facilities.

Infrastructure improvements and equipment upgrades for a number of hospitals and medical facilities are planned as part of the government's infrastructure development plans. The government also intends to develop a local pharmaceutical production capacity. Some international companies have shown interest in expanding regional production capacity by opening facilities in Botswana. The ARV program is funded with grant support from the African Comprehensive HIV/AIDS Partnership (ACHAP), a consortium between U.S. pharmaceutical company Merck and the Bill and Melinda Gates Foundation.

BRAZIL

The Brazilian pharmaceutical industry consists of 370 companies, representing a total market value of \$5.5 billion. This market is the 10th largest in the world and the second largest in Latin America after Mexico. Despite stagnating pharmaceutical sales over the past three years, Brazil still remains among the 5 largest sellers of units. In 2002, Brazil sold 1.6 billion packages of pharmaceuticals.

Among the pharmaceutical companies, 80% are domestic. Foreigners are mostly from the U.S. and Europe. Multinational companies supply 70% of the internal market, not including direct sales to the Government.

Taxes applied on medicines in Brazil are among of the highest in the world. The Government collects over \$1 billion in taxes from the pharmaceutical sector. The cascading tax method applied on manufactured goods in Brazil affects several industries, and is one of the most

important topics that private industry has raised with the Government. The process aimed at reducing these taxes on pharmaceutical production is slow and bureaucratic.

In 2002, Brazil's pharmaceutical net sales reached \$3.9 billion, in comparison to \$5.7 billion in 2001. The market has softened somewhat, but currency fluctuations make this drop more dramatic. Imports still represent a large share of the market. According to the Syndicate of the Pharmaceutical Industry (SINDUSFARMA), total Brazilian imports of pharmaceutical products in 2002 were approximately \$1.5 billion. This reflects a 0.4% increase over the previous year's level. Imports from the U.S. account for about 50% of Brazil's imports of pharmaceutical products.

Most Brazilian health insurance companies do not reimburse patients for prescription drugs. Similar to most countries in Latin America, over 80% of drug expenses in Brazil are paid by one's own resources. The average annual per capita consumption of pharmaceuticals in Brazil is approximately \$61, according to data from the Pan American Health Organization.

Certainly, one of the most problematic areas of the pharmaceutical sector in Brazil is the lack of access to essential drugs by a large portion of the country's population due to financial constraints. Estimates vary, but various sources suggest that 40% to 50% of the population have limited or no access to needed pharmaceuticals.

According to Brazilian legislation, the production, manufacturing, importation,

exportation and sale of any medical product, pharmaceutical or cosmetic must be processed through authorized companies only. Moreover, all products must be registered with the National Agency for Sanitary Health - ANVS, an agency of the Brazilian Ministry of Health. This is the Brazilian counterpart of the U.S. Food and Drug Administration.

The introduction of generic drugs in the Brazilian market, in 1999, created a dynamic investment process in the pharmaceutical market. In June 2003, considering sales for the past 12 months, the income from this sector reached \$224 million, which corresponds an increase of 47% for the same period in 2002. The public health care systems in most Brazilian states purchase almost the entire production of generic drugs as part of the government's program to distribute medicines to the poorest.

The generic market represents today approximately 6.5% of the total market. It is expected that in 2008 this market will reach sales of \$1 billion. Currently, approximately 85% of the raw materials used in the production of generic drugs in Brazil are imported. Sales of generic drugs should also be further boosted by the fact that 75 important medicine patents on best selling drugs will expire by 2004. This expiration of patents and the new demand may stimulate an increase in the scale of production, and may make Brazil a generic drug nexus, eventually beginning to export generic drugs. In addition to that, the Brazilian Government is investing in campaigns to stimulate the population to request generics during the visit to physicians.

CANADA

The Canadian demand for drugs and pharmaceuticals is growing steadily. It is expected to continue to expand at a rate exceeding 10% over the next two to three years. The Canadian pharmaceutical industry is highly developed. International and brand name pharmaceutical corporations are heavily invested in research, manufacturing, and sales and export operations in Canada. Canada's socialized medicine is the key to a robust market because it provides easy access to costly drugs for all Canadians under various health and social programs. In addition, most Canadians over 65 obtain prescriptions for a minimal annual or dispensing fee under universal plans managed by the provinces.

Competitively priced U.S. generic drugs can generally be registered without difficulty and benefit from provincial legislation which forces pharmacists to dispense the lowest priced generic version of a brand name to all patients on the provincial reimbursement program. However, the Patented Medicines Pricing Review Board (PMPRB) controls prescription drug prices in Canada, and sets prices at levels significantly lower than the U.S. market, U.S.-made pharmaceuticals may be less profitable to sell in Canada than in the United States.

U.S. generic drugs offer the best opportunity for new companies. Generics can generally be registered without difficulty and benefit from provincial legislation which forces pharmacists to dispense the lowest priced generic version of a brand name to all patients on the provincial

reimbursement program (e.g., people over 65, and individuals on social assistance).

This annual bio-pharmaceutical and health technologies event comprises an international networking forum; conferences featuring internationally renowned speakers; an exhibition showcasing products and services intended for the life sciences industry; and, a matchmaking event designed to enable venture capital, pharmaceutical and biotechnology business leaders to interact and make deals

GREECE

In 2004, the total Greek market for drugs and pharmaceuticals was a little over \$2.4 billion nearly all of which was imported. As production of raw materials for drugs/pharmaceuticals is non-existent in Greece, imports are 80% of the market. Direct imports from the U.S. accounted for a little over 10% (\$319 million) of the total Greek market for this sector. However, the actual share of U.S. brand products is much higher, approximately 50% because many U.S. drugs and pharmaceuticals are manufactured in and imported from third countries, and thus, they are not recorded as U.S. imports.

According to studies by IMS Health, a leading provider of information on the world pharmaceutical and healthcare markets, the drugs and pharmaceutical market in Greece will increase at an annual rate of 8% a year for the next five years with the import market increasing 16%. In Greece, all prescribed medicines are sold exclusively by privately owned pharmacies authorized by the state. Pharmaceuticals, which do not require a

prescription, are readily and easily available as over the counter products. In remote areas of Greece though, where pharmacies are not available, local doctors or health centers may sell medicines after obtaining special permission from the Ministry of Health. The Ministry also maintains a list of prescription drugs that are reimbursable by the public health funds. Not all drugs that are imported are included on the list.

The best sales prospects for the Greek market seem to be newly developed medications such as antibiotics, sulfonamides, pro-vitamins and vitamins. A successful entry of a U.S. company into the Greek market will depend on the proper selection of a good agent and a well-considered marketing approach that assists the agent in developing a proper relationship with the distribution chain, (hospitals, pharmacies, medical professionals, etc.).

The most recent development concerning drug pricing and reimbursement issues stems from the government's proposed overhaul of the existing pharmaceutical pricing and reimbursement system. The government intends to implement a number of new measures, including scrapping of the existing drug reimbursement system, the promotion of the generics sector and amendment of the social security fund's purchasing practices.

The Greek Government will propose a new system to cover the insured in terms of meeting patients' outlay on medicines from social security funds and to establish a common limit on the number of medicines on a small medical prescription. If successful, the pharmaceutical market could experience

dramatic growth, reaching \$4 billion by 2007.

The low level of prices, along with the ongoing problems of hospital debt, may act as a barrier to market access. On the other hand, the continued increase in demand for imported drugs combined with the aging population should drive growth. Market sources state if U.S. companies are able to maintain their currently competitive price structure, they will steadily increase their share in the Greek market.

IRELAND

Ireland is now ranked among the top 10 pharmaceutical exporting countries in the world. The industry comprises 120 foreign and national companies, employing over 21,000 people. Total investment by overseas firms is estimated at \$12 billion and employment growth in the sector averages at around 8% every year. Statistics for 2003 indicate an increase in exports of pharmaceuticals to over \$23 billion.

Pharmaceutical companies are generally small, employing between 250 and 500 people, 55% of whom are university graduates. Companies engage in manufacturing, marketing, contract R&D and clinic trials and produce both bulk and finished pharmaceuticals in the form of generic and branded products. Sixteen out of the top twenty pharmaceutical companies in the world have manufacturing facilities in Ireland.

R&D investment remains low at about 12% of annual sales revenue, but this figure is expected to rise. Ireland's focus for the industry has shifted from one of production to the movement of activities

up the value chain to include the development of R&D activities and the establishment of customer support, telemarketing, shared services and e-commerce activities. A strong sub-supply sector has grown up around the pharmaceutical industry to provide engineering, environmental consultancy, laboratory, health and safety, packaging and other support services.

Pharmaceutical companies source 44% of all goods and services locally.

Ireland has the third lowest consumption per capita of medicines in the EU yet the market is growing annually by over 10%. Inflation in pharmaceutical products amounted to 5% compared to a EU average of 1% in 2002. Due to the increased focus on costs, doctors are being urged to prescribe more generic drugs. State expenditure on medicines has increased in tandem with the increase in public expenditure on health, driven by the introduction of Government initiatives to improve public health, an increasing population and the increasing availability of medical cards. Medicines account for just 10.6% of non-capital health expenditures. Despite heavy lobbying from existing pharmacies, the Irish pharmacy market was deregulated at the beginning of 2002, placing no limit on the number of licenses the Government can issue for pharmacies subject to proper standards being met.

Self-medication remains an important part of the total Irish market for pharmaceutical products with analgesics holding 26% market share, cough and cold treatments, 23%, vitamins, 18%, digestive & intestinal remedies, 17% and skin treatment, 16%.

The four leading therapy areas are cardiovascular system at 21%, central nervous system, 18%, alimentary/metabolism, 17% and respiratory, 11%. Over-the counter (OTC) medicines account for 20% of the total pharmaceutical market. Pharmacies account for 81% of the distribution network, hospitals and doctors account for 15%, while the remaining 4% comprises of supermarkets and other retail outlets. Opportunities exist for U.S. suppliers to capitalize on the strong level of receptivity for U.S. drugs and pharmaceuticals.

Future market potential remains strong due to an anticipated increase in population, a general increase in health spending and the gradual aging of the population. Most promising sub-sectors include bulk pharmaceuticals, prescribed drugs, generic medicines and non-prescribed OTC products.

JAMAICA

The growth in the demand for drugs and pharmaceuticals in Jamaica is driven by a variety of occurrences such as the introduction or modification of laws, trade conditions, international medical breakthroughs, lifestyle change patterns, government programs and a variety of social and domestic conditions.

Best Prospects include medications such as for hypertension, respiratory diseases, sexually transmitted diseases and diabetes.

Exporters to Jamaica will find opportunities in both the public (government) and private (commercial) sectors. The major importer of drugs and pharmaceuticals in Jamaica is Health

Corporation Limited – a government company responsible for the sourcing and distribution of products primarily to the public health sector.

JAPAN

Japan continues to be the world's second largest consumer of pharmaceuticals and the largest international market for American drug firms. Each year, sales of prescription drugs in Japan total about \$70 billion. Japan's imports of pharmaceuticals account for almost 10% of the total market, and industry sources indicate that the total market share of foreign-origin drugs in Japan is much higher than suggested by current import levels. The market share for foreign firms is estimated to be approximately 45% if one includes direct imports, local production by foreign firms and compounds licensed to Japanese manufacturers. American pharmaceutical firms have achieved a market share approaching 20%.

The Japanese Government has undertaken a major reform of the Pharmaceutical Affairs Law (PAL) for the first time in 40 years. This revision, which will be fully implemented by April 2005, is expected to have a substantial long-term impact on the future of the Japanese drug market. The principal idea of this revision is to shift the focus of the regulatory system from the point of manufacture to the point of sale in order to put more emphasis on post marketing safety measures, as opposed to the act of manufacturing.

The current manufacturing approval system will be changed to a marketing approval system. Under the marketing approval system, a drug company will

no longer be required to have a manufacturing facility in Japan. Drug firms can outsource the entire manufacturing process if they so choose. The Japanese pharmaceutical industry believes that this change will enable drug companies to operate in a more efficient manner, facilitating production alliances and production division spin-offs. The market for contract manufacturing is expected to grow, possibly benefiting American contract manufacturers as well.

In a major policy paper known as "the Vision" released in August 2002, Japan recognized that innovation could foster economic growth and lead to improved healthcare. In the Vision paper, action plans comprising a wide range of policies concerning the R&D environment, regulatory system, and insurance reimbursements were presented as "concrete measures to be carried out in an intensive period" (within five years) to promote innovation. The Vision also recognizes the role of the market and the value of innovation. Although the Vision was created to spur the development of the Japanese pharmaceutical industry by fostering an atmosphere of innovativeness, U.S. pharmaceutical products would also stand to benefit, provided the Vision is implemented properly.

Japan's aging population is generating increased demand for pharmaceutical treatments for such chronic illnesses as cardiovascular problems, digestive problems, diabetes, and cancer, as well as for diagnostic reagents, etc. It is also expected that the Japanese government will further promote the use of generic drugs because Japan's aging population

is creating a budgetary crisis in the healthcare system.

Best Products/Services.

OTC (medication), medicine, cosmetics, cosmetics miscellaneous goods, functional food stuffs, healthcare, beauty care, supplement, prescription systems and care products, food and drink, home care, life enjoyment, store facilities, publishing and others.

KOREA

The Korean market, one of the largest in Asia for pharmaceuticals, was valued at \$5 billion in 2003 and will remain a top growth market for research-based, innovative pharmaceuticals in Asia over the near to mid-term. The market demand for pharmaceuticals in Korea has grown on average 8% annually over the past five years, outpacing the growth in the global market.

According to industry sources, Korean market demand for pharmaceuticals is estimated to have grown by 13% in 2004 to reach \$5.7 billion and is forecast to grow at an average annual rate of 5% over the next several years. The Korean pharmaceutical market has continued to experience unprecedented restructuring since 1999, when the Korean government implemented significant reform initiatives to improve the cost effectiveness of the health care system.

Among the major initiatives that have had a significant impact on market demand for research-based drugs are the implementation of Separation of Prescribing and Dispensing (SPD), Actual Transaction Pricing (ATP), and the A-7 policy of pricing local, innovative drugs at the level of advanced

countries. These reform initiatives have helped increase transparency in the reimbursement system and have, to some degree, leveled the playing field for multinationals. There have also been positive changes in the regulatory climate that have allowed smoother and earlier market access for new, innovative drugs. Since the implementation of SPD in 2000, multinationals have expanded their share of the total therapeutic (ethical and over-the-counter) pharmaceutical market from 31% in 2002 to 34% in 2003. Industry sources estimate that multinationals sales of the latest new drugs met almost 35% of the total therapeutic market share in 2004.

One important factor that may slow the growth rate in overall market demand and consumer appetite for innovative pharmaceuticals over the next few years will be the nature of measures the Korean government decides to take to manage the financing of the national healthcare insurance system. Many downward adjustments to reimbursement pricing on pharmaceuticals under Triennial Repricing went into effect in 2002 and 2003.

The Korean government has not yet decided whether to launch a Reference Pricing System (RPS), which, when first proposed in 2001, drew strong opposition from stakeholders, including the public at large, civic groups, doctors' associations, and the Korean and U.S. pharmaceutical industries. Industry sources predict that RPS, if implemented, will seriously limit market access for innovative, research-based pharmaceuticals and will introduce a two-tiered health care delivery system in Korea. Notwithstanding the Korean

government's cost containment measures, the U.S. government will continue to work closely with and advocate on behalf of U.S. exporters' market access concerns. This includes continuing to encourage the Korean Government to make the market more transparent, to reimburse innovative drugs at appropriate levels, and to ensure Korean patients' access to innovative pharmaceuticals.

Industry sources speculate that the Korean government's need to reduce costs will be balanced by satisfying consumer demands for advanced health care over the next few years. U.S. exporters of researched-based, innovative drugs are urged to enter this challenging, yet potentially lucrative and growing market. With the Korean government's encouragement, the Korean biotech pharmaceutical industry is striving to invest more in R&D (currently only 4-5% based on sales revenue) and diversify from the production of mainly generics and antibiotics, presenting excellent opportunities for U.S. biotech firms to participate in Korea's strategic biotech sector.

Although Korea's pharmaceutical industry is competitive in terms of chemical synthesizing technologies, it is much less competitive in drug screening, safety evaluation and clinical trials. Korean companies are pursuing strategic alliances with multinational firms to finance R&D for new products or for cross licensing of completed technologies. Industry experts predict that U.S. market share will increase as more U.S. biotechnology-based products become commercially available over the next few years.

Best Products/Services: -Therapeutic pharmaceuticals

The Osong Bio-technopolis, planned by the Korean Ministry of Health and Welfare, is seeking foreign investment for biotechnology industry development in the high-tech science park at Osong. The 4,633,000 square meter science park will be 59.7% Pharmaceuticals & Cosmetics and 25.8% medical devices. Since the Korean biotech industry is still relatively undeveloped, the timing may be good for U.S. companies interested in getting in on the ground floor.

LEBANON

Lebanon is the leading importer of pharmaceutical drugs in the Levant region and has over 50 pharmaceutical importing firms. The pharmaceutical market generates around \$400 million every year in retail sales. The local pharmaceutical manufacturing industry is weak. Imports constitute between 92 and 95% of total consumption.

NEPAL

Although figures indicate a declining trend in the import of medical equipment, sales of medical equipment and drugs may continue to grow steadily, as the degree of medical training and a middle class that can afford foreign medicine increases. The decline in imports in the last two years is primarily due to the worsening security and political situation in the country. This market has the potential to bounce back as soon as the security situation improves.

Private sector medical facilities are expanding very quickly in Nepal. In recent years almost half a dozen medical colleges and hospitals have opened up in various parts of Nepal. These colleges and hospitals have a constant need for upgrading their testing and treatment facilities to make their services competitive. They therefore need to import modern medical equipment on a regular basis.

NORWAY

In 2003, the sales of drugs and pharmaceuticals from wholesalers to Norwegian pharmacies and hospitals increased by 3.3% to \$1.43 billion (based on pharmacy purchase prices – PPP). Sales from pharmacies to consumers (based on pharmacy retail prices - PRP) reached \$2.16 billion in 2003. Despite the number of acquisitions and mergers in the pharmaceutical industry, the industry is still very competitive, with only company having a market share above 10%. Aggregate sales of the top 25 pharmaceutical companies in Norway totaled USD 1.21 billion in 2003. Norway's largest pharmaceutical company in 2003 was Pfizer with sales of \$207 million and a 14% market share. Merck (MSD Norge AS) was the second largest pharmaceutical company in Norway with a 2003 turnover of USD 122 million. The next three largest companies on the list were AstraZeneca, GlaxoSmithKline, and Nycomed Pharma.

Parallel importers are also found among the list of 25 companies with the highest turnover in 2003. Farmagon, the largest parallel importer in Norway, was ranked 8th on the list with sales of \$40 million.

The market share for parallel-imported medicines was 6.6% in 2003, up from 6.3% in 2002.

The pharmaceutical industry may be the most regulated of Norwegian industries. The Norwegian Medicines Agency is the national regulatory authority on assessment and surveillance of new and existing medicines in Norway. The Norwegian Medicines Agency fixes the maximum purchase price (PPP) on prescription medicines. Non-prescription prices have been determined by the market since 1995. The main rule when pricing a medicinal product in Norway is that it is set at the mean of the three lowest market prices of that product in a selection of countries. The countries normally included in the price comparison group are Sweden, Finland, Denmark, Germany, Great Britain, the Netherlands, Austria, Belgium and Ireland.

Norwegian pharmacy purchase prices were, in the spring of 2000, on a par with other European countries. However, the new price determination system implemented in mid-2000 has since brought Norwegian medicine prices down. Prices are now well below the Euro-zone average. Another of the responsibilities of the Norwegian Medicines Agency is to prepare recommendations and pass resolutions concerning acceptance of drugs to the reimbursement scheme (in Norway known as "blue prescription reimbursement").

Foreign pharmaceutical firms continue to experience difficulties in the Norwegian market. Transparency on pricing and reimbursement decisions and recommendations is lacking. U.S.

pharmaceutical products often face lengthy delays in securing approval for their products' inclusion in the state health care reimbursement scheme. Reimbursement and approval decisions are complex and political, with Parliament making final decisions as part of its budget process. The Norwegian Association of Pharmaceutical Manufacturers, which includes leading U.S. pharmaceutical firms, has complained about Norway's inadequate implementation of EU directives on transparency of measures regulating medicinal products for human use.

Although Norway complies with the letter of EU requirements that reimbursement applications be acted on within 180 days, Norwegian authorities often reject applications as the period expires, giving them an unlimited amount of time to consider applications once appealed. U.S. pharmaceutical manufacturers also cite Norway's total prohibition of supplying product information – ranging from advertising to scientific data – to consumers as a barrier to market entry and expansion. Consumers are not fully informed about pharmaceutical innovations, dampening demand for new products and sometimes delaying consumer access to the latest medicines. Drug prices and consumption of medicines in Norway are below European averages.

Best prospects for U.S. suppliers are still drugs associated with the treatment of cardiovascular diseases, high cholesterol, high blood pressure, asthma, mental (psychiatric) disorders, gastric ulcers, allergy, and pain relief.

Around 5,300 medicines, including all strengths and dosages, and 1,350 active substances are currently on the Norwegian market. Medicines for cardiovascular diseases, asthma and mental illnesses dominate the list of the top 25 medicines on the Norwegian market in terms of sales in 2003. Prescription medicines tend to cost more than non-prescription medicines, so prescription medicines also dominate the list. Only two medicines on the list are available in non-prescription packages. Measured in terms of the number of packaged units sold, the picture is somewhat different. Here, the list is dominated by non-prescription medicines, with drugs for pain and nasal congestion commanding the largest sales volume.

Consumption measured in daily doses showed a 3.4% growth in 2003. A significant reason for the growth rate is the gradual transition toward new, more effective, and often more expensive medicines with fewer side effects. In Norway, innovative medicines have a market share measured in PPP of 37%. Among these are newer medicines for rheumatic conditions, asthma and cardiovascular diseases (most notably high cholesterol levels and high blood pressure). Norway's population is aging, increasing the demand for pharmaceutical products. Another reason for the growth is that new medicines have made it feasible to treat patients who previously could not be given adequate treatment with available drugs.

Although the pharmaceutical companies continue to face considerable challenges vis-à-vis the national regulatory authorities, the market still remains significant.

Healthcare in Norway is publicly funded. The cost of medicines represents about 8% of the public spending on health care in Norway. The largest part of medicine consumption is financed through the National Insurance Administration's reimbursement of most prescription medicines. The Norwegian Government funds about two-thirds of total medicine costs. Public spending on medicine per capita is about \$250. The private share includes the patient's expenditure on non-prescription medicines, non-reimbursable prescription medicines, and co-payment for reimbursable prescription medicines. The maximum level of co-payment for reimbursable prescription medicines is about \$200 per patient.

Pharmacies have traditionally been highly regulated in Norway with a virtual monopoly among a privileged few proprietary pharmacists protected by outdated laws and regulations. A new pharmacy regime came into effect at the beginning of 2001, opening this area to competition and allowing foreign investors to own individual pharmacies or chains of pharmacies. Major structural changes and competitive positioning are still underway in this sector. Of the country's 518 pharmacies, 487 are privately owned and 31 are publicly owned hospital pharmacies. The major pharmacy chains control 93% (481 pharmacies) of the 487 privately owned pharmacies. The major chains are Vitus/Ditt Apotek (Norsk Medisinaldepot/GEHE), Alliance (Alliance UniChem), and Apoket 1 (Apokjeden).

PHILIPPINES

From 2003 to 2004, imports of pharmaceutical products to the Philippines rose from \$321 million to \$355 million, or 11%. Pharmaceutical companies attributed the increase to continued demand for OTC and prescription drugs for the maintenance or treatment of various diseases. Overall, the pharmaceutical market is expected to grow by 5.5% per year.

The country falls under the Third World country category and will thus continue to battle poverty-related diseases in the foreseeable future. Although statistical data on local production are not available, industry players report an increase in local manufacturing activity.

The leading sources of pharmaceutical products in 2003 were Switzerland (12%), Germany (12%), France (10%), Australia (9%), and the U.K. (9%). U.S. market share was 6%. 85% of pharmaceutical products are sold through drug stores, 15% through hospitals and doctors' clinics.

U.S. pharmaceuticals continue to have a strong market presence, because they are well known in the market. The Philippine Bureau of Food and Drugs (BFAD) has adopted a system of drug review and approval patterned after the U.S. FDA.

Drug retailing is among the most profitable businesses in the country. As in previous years, pharmaceutical prices did not increase as fast as the consumer price index as a result of demand and competition among market players.

Pharmaceutical products are registered with the Department of Health-Bureau of Food and Drugs (DOH-BFAD). Registration requirements may be found in this DOH link:
<http://www.bfad.gov.ph/regulated%20products.htm>

Best Products/Services.

- 30019 Heparin and its salts; other human/animal substances prepared for the therapeutic or prophylactic uses, not elsewhere specified or included:
- 30023 Vaccines for Veterinary Medicine,
- 30029 Human/animal blood for therapeutic /anti allergenic preparations; toxins; cultures of microorganisms; similar products (excluding yeast).
- 30039 Medicaments consisting of 2 or more constituents mixed together (excluding goods under heading 3002, 3005, 3006),
- 30043 Medicaments containing adrenal cortex hormones but not containing antibiotics,.30051 Adhesive dressings and articles with adhesive layer,
- 30059 Wadding, gauze, bandages, etc impregnated/coated with pharmaceutical substances for medical, surgical purposes, etc.

Factors that continue to spur demand for pharmaceutical products are increasing rates of common ailments among Filipinos. These include hypertension, cardiac problems, respiratory ailments, and kidney problems.

Hypertension and kidney failure are results of a poor man's diet of dried fish and shrimp paste, and the Filipinos' preference for salty foods. Canned goods

(sardines, luncheon meat) and prepared/ready-to-cook foods (noodles, fish chips), which are cheaper than fresh food and meat products, are within the reach of the poor. These foods are high in salt content and other preservatives.

In addition to medicines, the Philippines clinical laboratory industry is growing quickly. Clinical tests are required of local and overseas contract workers before they can begin their employment. Schools also direct students to undergo blood tests, and almost all insurance companies require applicants to submit medical test results. As a result, consumables for clinical laboratories, like toxins, serum, and other preparations, are among the best prospects for U.S. companies.

RUSSIA

Russia has a developed pharmaceutical market with many major Western drug manufacturers represented in the country. The total market grew 19% in 2003 to \$3.3 billion. Local production in 2003 also grew by 19% to \$1.099 billion. Russia's imports of pharmaceuticals grew by 36% in 2003 and amounted to \$2.289 billion, or about 66% of the total market. About 63% of total imports come from Western Europe, the United States, Canada and Japan. The top ten foreign suppliers of pharmaceuticals to the Russian market in 2003 included the following companies: Aventis, Gedeon Richter, Sanofi-Syntelabo, Berlin-Chemie/Menarini Pharma, Novo Nordisk, Novartis, KRKA d.d., Pfizer International Inc., Eli Lilly and GlaxoSmithKline.

About 700 enterprises of different sizes specialize in manufacturing

pharmaceutical products in Russia. According to the April 2004 edition of Remedium magazine, over 50% of total domestic output is controlled by 10 large manufacturers, including ICN Pharmaceuticals, Otechestvennyye Lekarstva, Veropharm, Nizhpharm, Bryntsalov A, Akrikhin, Moskhimfarmpreparaty, Syntez, Biosyntez and Biokhimik. Domestic pharmaceutical producers specialize mainly in production of generics as well as tableting and packaging drugs made of imported substances. From 85 to 90% of all the substances used in pharmaceutical production are imported from Western Europe, China and India.

Beginning in 2005, Russian manufacturers of drugs are supposed to comply with the new national GMP standard R52249-2004, which is a significant step forward towards harmonization with the internationally accepted pharmaceutical production standards. However achieving actual compliance to this standard may take several years.

Concentration of the distribution sector has been growing in the last several years. The number of distributors declined from several thousand to about 700 in 2003. The top ten distributors control about 50% of the total market. The top three distributors in 2003 were Protek, SIA International and Shreya Corporation.

Best prospects for U.S. exports include cardiovascular, cancer, asthma, neurological and hormonal drugs, insulin, antibiotics, analgesics, vitamins, vaccines, and AIDS and psychotropic drugs. Another promising sub-sector is biologically active food additives. The

total market of biologically active food additives was \$2 billion in 2003.

The Russian pharmaceutical market presents good opportunities for Western drug manufacturers especially in the high-end quality product segment. The major obstacles in developing the pharmaceutical market in Russia are lack of transparency in the registration and certification systems as well as inadequate IPR protection and a large percentage of counterfeit medicines. According to different analysts, counterfeit drugs currently represent from 7 to 12% of the market.

SAUDI ARABIA

The Saudi market for drugs and pharmaceuticals continues to be the largest and most dynamic market in the region. Saudi Arabia spends more than \$1 billion a year on drugs and pharmaceuticals. Being the largest GCC country, Saudi Arabia consumes about 65% of all pharmaceutical imports to the GCC market. There is concern, however, over the Saudi Government's handling of IPR issues, especially those related to pirated pharmaceuticals. Saudi health officials have tried to reassure manufacturers saying that pirated versions of patent-protected drugs will not be registered with the Saudi Government.

The Saudi public sector represents 40% of the demand for pharmaceuticals, while private hospitals and households account for the balance. The share of local manufacturers has grown over the last three years from 20% in 2001 to more than 25% in 2002, reaching a three-year high of \$339 million in 2002. Due to the global nature of this industry,

it is hard to differentiate between the share of U.S. or European pharmaceutical companies, but combined both account for more than 80% of Saudi Arabia's pharmaceuticals import bill.

Saudi Arabia has more than 4,600 registered drugs, both generic and patented. Many of the generic drugs are manufactured locally under license. There are around 200 local pharmaceutical companies registered with the Saudi Ministry of Health. 20 of these local companies control close to 70% of the market.

U.S. firms could find their best opportunities in joint ventures with local partners or licensing arrangements, in addition to the supply of raw material to the local pharmaceutical industry.

SWEDEN

During the past two decades, the Swedish pharmaceutical industry has expanded and established itself as one of Sweden's two most important growth industries. Domestic industry is active in research and drug sales in the areas of oncology, growth disorders and eye diseases, gastrointestinal, respiratory and cardiovascular diseases. The U.S. market share (estimated at 42%) is the highest among foreign suppliers. American pharmaceutical firms are considered world leaders in research and production and consequently their products enjoy a good reputation.

The Swedish pharmaceutical market is highly competitive, but according to trade sources the following areas should represent opportunities for new entrants in the market: antibiotics, anti-asthmatics, impotence treatment,

treatments for Alzheimer's disease, AIDS and cancer.

SWITZERLAND

Switzerland is a wealthy market in which healthcare spending accounts for 11% of GDP and per capita spending is the second highest in the world after the U.S. Swiss per capita spending on pharmaceuticals was estimated at \$630 in 2004 with the total market demand valued at \$4.7 billion at retail prices. Market demand for innovative products is growing by 3%-4% annually.

Only 28% of pharmaceuticals sold in Switzerland are produced domestically, and imports account for 72% of the total market demand. Imports from the United States in the pharmaceutical sector represent a market share of approximately 30%. U.S. products, recognized for their quality and innovation, are well positioned on the Swiss market.

Best prospects are new, innovative preparations in the following fields:

- Cardiovascular diseases
- Cancer
- Infections
- Allergies
- Hypertension
- Aids
- Diabetes
- Transplantation medicine

There is also growing demand for lifestyle and anti-aging pharmaceuticals. New and niche products in these fields as well as in OTC and blockbuster groups (i.e., antidepressants, painkillers, etc.) promise growth.

There are about 14,408 medical doctors, 1,662 pharmacies and 758 drugstores in Switzerland. Since doctors may prescribe as well as dispense, doctors and pharmacists together account for a combined 80% of all pharmaceutical sales and are the appropriate target audience for product information. Drugstores account for 11% of all drug sales in Switzerland.

Direct sales of pharmaceuticals from foreign companies are illegal in Switzerland. Only Swiss-based firms may submit applications for approval. Consequently, U.S. companies must enter the market through either cooperation with domestic distributor/manufacturer by licensing the product, the acquisition of a Swiss company, or independent set-up of direct sales subsidiaries.

THAILAND

The food supplement market in Thailand is untapped. It is growing, and import products are highly accepted by end-users in Thailand. The preventive health campaign initiated by the Ministry of Public Health has stimulated health consciousness among people in Thailand. Food supplement products have been regarded as a part of preventive health, so it is expected that demand for food supplements will grow further and the market size will increase by 15-20% in the next few years.

Imported food supplements are still very well-received by end-users in Thailand as having consistent quality when compared to food supplements made locally. Imports account for 40% of the total market, and products from the U.S. have a 20% share of the total imports.

Food supplements from the U.S. are regarded as having good quality. Generally, most importers and distributors of food supplements in Thailand will be willing to work with manufacturers from the United States. The only requirements are the need for a document from the U.S. manufacturers for regulatory affairs and product registration with the Thai Food and Drug Administration.

The Food and Drug Administration (FDA) of the Ministry of Public Health controls the importation and marketing of food supplements in Thailand. The Thai FDA considers food supplements either as a food or drug, depending on the recommended daily intake rate. Food supplements have to be registered with the Thai FDA and obtain product registration and import authorization prior to import. The Thai FDA also controls the advertising of the food supplements, and prior approval of advertisement is required.

Direct selling is still the leading approach to marketing food supplements in Thailand. Direct selling accounts for approximately 70% of total sales. Over-the-counter sales have approximately 25% and are expected to drop in the future. Physicians still play a small role in prescribing food supplements to their patients. This group accounts for 5% of total sales. The success of the direct selling approach lies with the fact that potential customers need to know the products and their benefits in order to make a buying decision. The direct selling approach not only provides a chance to pass on product information, but also to develop a personal relationship with clients.

Weight control and fat burner supplements still have good potential in Thailand. Weight problems and good appearance seem to be two good reasons for the growth potential of the market for these food supplements in Thailand. Food supplements, such as ginkgo biloba and ginseng that help improve blood circulation and reduce the risk of cardiovascular diseases are very well received here in Thailand. Heart disease is still one of the major causes of death in Thailand. Taking food supplements is accepted as a way to lower the risk of cardiovascular disease.

Import of proprietary food supplements in bulk also has a good potential, especially among pharmaceutical manufacturers in Thailand. Most pharmaceutical manufacturers in Thailand are in Good Manufacturing Practice compliance. Additionally, Thailand has a cheap labor cost. Most of them also have an established marketing and selling team, which facilitates them in marketing the products.

Best Products/Services.

- Blood Circulation Food Supplements
- Antioxidant and Anti-Aging Food Supplements
- Weight Control and Dietary Food Supplements
- Vitality Food Supplements
- Postmenopausal Food Supplements
- Sports Food Supplements

The opportunity for manufacturers of food supplements in the U.S. is huge in Thailand. It lies with facts that Thailand is an open market and food supplements from the U.S. have superior quality.

UKRAINE

The Ukrainian pharmaceutical market shows stable growth for the past four years. This growth results from increases of both imports and local pharmaceutical production. Imported pharmaceuticals accounted for 63% of the total market in 2003. The leading pharmaceutical exporter to Ukraine is Germany (19.2% of all imported pharmaceuticals). France holds second place (11.3%). India is a close third (11.1% share). The U.S. share in 2003 was 3.8%. Most of the multinational pharmaceutical manufacturers are present in the Ukrainian market either with representative offices or through local distributors.

The local pharmaceutical industry is increasing its production and exports mostly to Russia and the CIS countries. There are 58 major pharmaceutical manufacturers in Ukraine, most of them private. Domestic manufacturers operate in the lowest price segment of the market, supplying predominantly generic drugs, brand generics and vitamins. The largest local producers are: Darnytsia, Kyivmedpreparat, Pharmak, Borshchahivsky Chemical and Pharmaceutical Plant (Kiev); Stryrol (Donetsk); Zdorovia (Kharkiv); Halychpharm (Lviv); and Biostimulator (Odessa).

The best selling ATC2 (Anatomical, Therapeutic, Chemical 2) categories in Ukraine include analgesics, antibiotics, vitamins, cough & cold preparations, cholagoguehepatics, phycolectics and vasotheapeutics. The best sales performances are by companies, which have strong over the counter (OTC) volume.

In late 2000, the Ukrainian government extended its deadline from 2002 to 2007 for pharmaceutical producers to become good manufacturing practices (GMP) compliant. This affects only manufacturing sites located in Ukraine. In the longer term, some multinationals may look closely at potential acquisitions or joint ventures in Ukraine. Access to local manufacturing capacity would offer significant advantages in the current regulatory climate. It should become clear in the next several years which domestic producers are likely to succeed in efforts to reach international GMP standards.

UNITED KINGDOM

The UK pharmaceutical market was valued at \$15.4 billion in 2003 and grew by approximately 7% in 2004. Prescription drugs account for 83% of the market, with over-the-counter (OTC) products comprising the remainder. Prescription drugs use rose by 4% in 2003, and the OTC market grew by 8%. U.S. companies dominate local drug production and hold 24% of the import market.

The key requirement for selling pharmaceutical products in the UK is a product license granted by the UK's Medicines and Healthcare Products Regulatory Agency (MHRA) which boasts the fastest new drug approval times among European regulatory bodies. Additionally, all novel products including biotechnology-related products need to go through the European Medicines Agency (EMA) licensing process. The London-based EMA is the EU's centralized agency for Single Market Approval.

Additional regulatory hurdles that pharmaceutical companies face are:

- a) The UK National Institute of Clinical Excellence (NICE), which judges the clinical and cost-effectiveness of new and existing drugs, treatments, and medical devices and provides the NHS with guidance on treatment strategy;
- b) The UK's Pharmaceutical Price Regulation Scheme (PPRS), which limits profits that pharmaceutical companies are allowed on their sales to the National Health Service (NHS); and
- c) The UK government's mandatory price caps on generic medicines used in NHS primary care, which limit the maximum prices for generic drugs

In the area of Vitamins, Minerals and Supplements, U.S. VMS manufacturers should be well aware of the new EU Food Supplements Directive. The Food Supplements Directive 2002/46/EC will come into effect under UK law on 1 August 2005, and apply the provisions of this Directive with respect to the sale of food supplements after this date. This is a key piece of legislation because it will significantly tighten the UK vitamins, minerals, and supplements (VMS) regulatory environment and therefore make market entry more difficult. Until its implementation, the UK was one of the more liberal EU members in terms of VMS regulation.

The UK Department of Health is currently committing a great deal of resources in furthering progress in treating the following diseases:

-Cancer

- Alzheimer's
- Parkinson
- Other diseases associated with a rapidly growing aging population
- Diabetes
- Rheumatoid Arthritis

Innovative treatments in those areas are being actively sought by the DOH.

IV. TRADE EVENTS

Trade events, such as trade shows, trade missions and catalog shows, offer excellent opportunities for face-to-face interaction with foreign buyers and distributors. Of the many U.S. and international events held throughout the year, some are vertical (single industry theme) and some horizontal (many industries represented). The events organized or approved by the U.S. Department of Commerce can be especially useful for first-time or infrequent participants – they require less lead time to register and typically involve more handholding.

The Trade-Event Scheduling Web sites listed below allow selective searches for upcoming events by industry, location, type and date. They typically provide the event organizer, event descriptions and costs, and people to contact for more information.

To find upcoming events for Drugs/Pharmaceuticals, use industry search terms relating to Health Technologies, Biotechnology, or Drugs/Pharmaceuticals.

Schedules for U.S. Government Organized or Sponsored Events

Domestic USDOC Events: http://www.export.gov/comm_svc/us_event_search.html

International USDOC Events: http://www.export.gov/comm_svc/intl_event_search.html

USDA (Food & agriculture) Events:

<http://www.fas.usda.gov/scripts/agexport/EventQuery.asp>

Schedules for Commercially Organized Events

TSNN (<http://www.tsn.com/>)

ExpoWorldNet (<http://www.expoworld.net/>)

Exhibition Center - Foreign Trade Online (<http://www.foreign-trade.com/exhibit.htm>)

V. AVAILABLE MARKET RESEARCH

Drugs/Pharmaceuticals

All the reports listed below are in-depth, country-specific surveys of the market for a specific industry sector or sub-sector, written by U.S. commercial staff in these countries. Many of these reports analyze demand trends, the competition, business practices, distribution channels, promotional opportunities, and trade barriers.

All the reports can be obtained on line at no cost from www.export.gov or from the CITD.

CENTER FOR INTERNATIONAL TRADE DEVELOPMENT

13430 Hawthorne Blvd, Hawthorne, California 90250 USA

Phone: (310) 973-3173 Fax: (310) 973-3132 E-mail: mkogon@elcamino.edu

Australian Health Spending Grows	Australia	11/4/2004
U.S. Pharmaceutical Companies Benefit from Australian Government Grants	Australia	6/9/2004
In-Vitro Diagnostics Market - Austria	Austria	10/06/2005
Drugs and Pharmaceuticals	Austria	5/31/2005
The Belgian Market for Vitamins	Belgium	9/02/2005
Regulation of Phytotherapeutics	Brazil	8/18/2005
The market for life style drugs is expanding	Brazil	3/18/2004
Pharmaceutical Market Brief - Bulgaria 2005	Bulgaria	8/17/2005
Overview of Drug Regulations Under Food and Drugs Act	Canada	8/31/2005
Ontario's Vibrant Biotechnology Industry: Developments and Opportunities	Canada	11/9/2004
Cosmeceuticals	Canada	8/31/2004
Natural Health Products	Canada	6/20/2004
New Natural Health Products Regulations	Canada	1/9/2004
Pharmaceuticals	Chile	9/30/2005
Pharmaceutical/Drug Industry in China	China	8/29/2005
Post-SARS Disease Control Market in China	China	8/12/2004
Regulation on Pharmaceutical Distribution Licensing-Shanghai	China	7/21/2004
Food Supplements Market in the Czech Republic	Czech	7/25/2005
Impact of CAFTA-DR on the Drugs and Pharmaceutical Sector	Dominican	11/22/2005
Vitamins and Supplements	Ecuador	9/30/2004
Pharmaceutical Intermediates	Germany	11/04/2005
Pharmaceuticals	Germany	9/29/2004
Healthcare Products and Services -- Ghana	Ghana	6/14/2004
Vitamins and Provitamins	Greece	5/30/2005
The Greek Market for Drugs & Pharmaceuticals	Greece	4/6/2004
Indian Pharmaceutical Industry	India	5/3/2005
The OTC Pharmaceutical Market In Ireland	Ireland	12/08/2005
Deregulation Affects Marketing of OTC's & Non-Prescription Medicines	Israel	6/15/2004
Exporting Vitamins to Israel; The Market and Procedures	Israel	1/8/2004
Drugs and Pharmaceutical Report	Italy	9/22/2005
Generic Drugs	Japan	8/30/2005
Generic Pharmaceuticals	Netherlands	4/29/2005

Drugs and Pharmaceuticals	Peru	9/13/2005
Introduction of generics in Portugal	Portugal	1/10/2005
Market for Pharmaceuticals in Portugal	Portugal	4/14/2004
Romanian Pharmaceutical Sector Update	Romania	8/12/2005
Recent Trends in the Russian Pharmaceutical Market	Russia	7/25/2005
Russian Pharmaceutical Substances Market	Russia	2/24/2005
Saudi Arabia: Pharmaceuticals International Market Insight	Saudi Arabia	4/4/2005
Overview of Pharmaceutical Market in Spain	Spain	8/04/2005
Swiss Biotechnology Market	Switzerland	7/12/2005
Switzerland's Biotech Industry Thrives	Switzerland	12/21/2004
Pharmaceutical Market Switzerland	Switzerland	12/13/2004
Roche unveils biotech drive	Switzerland	7/13/2004
Drugs and Pharmaceuticals Market in Ukraine	Ukraine	3/18/2005
Pharmaceutical Market in Vietnam.	Vietnam	11/23/2005
Vietnam Pharmaceutical Market	Vietnam	7/19/2004

VI. APENDIX

Drugs/Pharmaceuticals, by HS/Schedule B Code

HS/Schedule B Codes	Description
300210-90	Aggressins
300210	Antisera
300210	Blood Derivatives For Passive Immunization (Human Use)
300210	Blood Plasma, Except For Relief, Bulk, Except Preparations
300210	Blood Plasma, Human
300210	Human Blood Plasma
300210	Human Serum, Normal, Whether Or Not Freeze-Dried
300210	Normal Human Serum, Whether Or Not Freeze-Dried
300210	Plasma, Human Blood
300210	Plasma, Human, Except For Relief, Bulk, Except Preparations
300210	Plasma, Irradiated Anthemophilic, Dried, Bulk, Except Preparations
300210	Serum, Blood, Normal, Bulk, Except Preparations
300210	Serum, Human, Normal, Whether Or Not Freeze-Dried
300210	Thyroid Products, Bulk, Except Preparations
300210	Venom, Snake, Bulk, Except Preparations
300230	Avian Bacterin (Mixed Chicken Formula)
300230	Avisepius Gallinarum Bacterin
300230	Biological Products, For Veterinary Use
300230	Blackleg Aggressins
300230	Bovine Bacterins
300230	Canine Bacterins
300230	Equine Bacterins
300230	Serums For Veterinary Use
300230	Toxin, Schick Test, Diluted, Veterinary Use
300230	Toxins, For Veterinary Use
300230	Toxoids, For Veterinary Use
300230	Vaccines, For Veterinary Use
300230	Veterinary Biological Products
300290	Allergen, Poison Ivy Extract
300290	Allergen, Poison Oak Extract
300290	Allergen, Pollen Extracts, Hay Fever
300290	Allergen, Pollens
300290	Allergen, Ragweed Pollen
300290	Allergenic Preparations
300290	Antigen And Pollen Combine
300290	Antigen, Bacterial, Udenatured, Respiratory

300290	Antigen, Rhus-All
300290	Antigen, Vereum (For Frei Test)
300290	Blood Whole, Except For Relief, Bulk, Except Preparations
300290	Blood, Whole, Human
300290	Human Blood, Whole
300290	Whole Human Blood
300390	Adermin B6 Preparations, Bulk
300390	Alpha Tocopherol Preparations, Bulk
300390	Artificial Mixtures Containing One Or More Vitamins, No Antibiotics, Bulk
300390	Ascorbate, Sodium, Preparations, Bulk
300390	Ascorbic Acid Preparations, Bulk
300390	Ascorbyl Palmitate Preparations, Bulk
300390	B-Complex Mixture, Bulk
300390	Calciferol Preparations, Bulk
300390	Calcium Pantothenate Preparations, Bulk
300390	Calcium Phosphate Compound With Viosterol, Bulk
300390	Carotene Preparations, Bulk
300390	Cebione Ascorbic Acid Preparations, Bulk
300390	Cevalin Preparations, Bulk
300390	Cevitamic Acid Preparations, Bulk
300390	Choline Chloride Preparations, Bulk
300390	Cobalamin Concentrate Preparations, Bulk
300390	Combex Powder Mixture, Bulk
300390	Concentrates, Vitamin, Preparations, Bulk
300390	Cyanocobalamin Preparations, Bulk
300390	D-Pantothenol Preparations, Bulk
300390	Dimethylamide Of Nicotinic Acid Preparations, Bulk
300390	Ergosterol (Not Irradiated) Preparations, Bulk
300390	Ergosterol, Irradiated, Preparations, Bulk
300390	Ferrous Ascorbate Preparations, Bulk
300390	Ferrous Sulfate With B Vitamins, Bulk
300390	Folic Acid, Preparation, Bulk
300390	Gevral Preparations, Bulk
300390	Menadiol Preparations, Bulk
300390	Menadione Preparations, Bulk
300390	Mercuryhydrin With Ascorbic Acid, Bulk
300390	Multivitamins, Bulk
300390	Niacin Preparations, Bulk
300390	Nicotinic Acid Diethylamide Preparations, Bulk
300390	Nicotinic Acid Preparations, Bulk
300390	Oil, Halibut Liver, Medicinal, Preparations, Bulk

300390	Oil, Shark-Liver, Medicinal, Preparations, Bulk
300390	Oleovitamin A And D, Bulk
300390	Panthenol Preparations, Bulk
300390	Pantothenic Acid Preparations, Bulk
300390	Pantotheryl Alcohol Preparations, Bulk
300390	Phytonadione Preparations, Bulk
300390	Pyridoxine Hydrochloride Preparations, Bulk
300390	Quertine With Ascorbic Acid, Bulk
300390	Retinal Preparations, Bulk
300390	Riboflavin Preparations, Bulk
300390	Roniacol Preparations, Bulk
300390	Roniacol Tartrate Preparations, Bulk
300390	Royal Jelly With Vitamins, Bulk
300390	Rubramin Preparations, Bulk
300390	Sodium Ascorbate Preparations, Bulk
300390	Sodium Folate Preparations, Bulk
300390	Sodium Panthothenate Preparations, Bulk
300390	Taka Combex Powder Mixture, Bulk
300390	Thaimine Hydrochloride Preparations, Bulk
300390	Thaiminemononitrate Preparations, Bulk
300390	Thiamine Chloride Preparations, Bulk
300390	Thiamine Hydrobromide Preparations, Bulk
300390	Thiothiamine Preparations, Bulk
300390	Tocopherol Preparations, Bulk
300390	Trophite Liquid (With Vitamins), Bulk
300390	Vitafac, Preparation, Bulk
300390	Vitamelk, Preparation, Bulk
300390	Vitamin Preparations, Bulk
300410	A-P Cillin, Dosage
300410	Abbecillin
300410	Ampicillin
300410	Aquicillin A. S, Dosage
300410	Benzathine Penicillin, Dosage
300410	Benzethacil, Dosage
300410	Bicillin, Dosage
300410	Cilleral
300410	Clopane-Penicillin, Dosage
300410	Compocillin-V
300410	Crystifor
300410	Despasilina, Dosage
300410	Eskacillin Dosage
300410	Ethacilin Dosage
300410	Gelu-Cillin
300410	Ledercillin, Dosage
300410	Lentopenil
300410	Maxipen, Dosage
300410	Neo-Penil

300410	Notaral
300410	Ornapin
300410	Pazillin
300410	Pen Vee-Cidin
300410	Pen-Vee
300410	Penadur
300410	Penadur L-A
300410	Penalev
300410	Penicillin And Compounds, Dosage
300410	Penicillin Srd
300410	Penicillins, Dosage
300410	Penidure
300410	Permapen, Dosage
300410	Procaine Penicillin In Oil With 2 Per Cent Aluminum Monosterate
300410	Pronapen, Dosage
300410	Remanden, Dosage
300410	Topicillin
300420	Achromycin, Dosage
300420	Actinomycin, Dosage
300420	Aureomycin Hydrochloride, Dosage
300420	Aureomycin, Dosage
300420	Bristacycline, Dosage
300420	Chlortetracycline, Dosage
300420	Cyclomycin, Dosage
300420	Erythrocin (Erythromycin), Dosage
300420	Erythromycins, Dosage
300420	Erythromycins, Dosage, Single, Systemic
300420	Tetracyclines, Dosage
300420	Tetrex, Dosage
300440	Eye Preparations, (Also See Specific Type)
300440	Eye Preparations, Dosage
300440	Eye Preparations, Pharmaceutical Dosage
300450	A, B1, B2, D Plus C Capsules
300450	A-B-D Capsules
300450	Abdec
300450	Abdol
300450	Afaxin
300450	Alpha Tocopherol, Dosage
300450	Alphalin
300450	Anti Stress Formula, Dosage
300450	Aquavitin
300450	Ascorbate, Sodium, Dosage
300450	Ascorbic Acid, Dosage
300450	Ascorbicin
300450	Ascorbin
300450	Ascorbyl Palmitate, Dosage
300450	B Complex Panoplex
300450	B-Complex Mixture, Dosage

300450	B-Jen (Elixir Of Vitamin B1)
300450	Becotin
300450	Becotin With Vitamin C
300450	Berocca Compound, Dosage
300450	Betalin Complex
300450	Betalin Compound
300450	Bone Meal With Vitamin D, Dosage
300450	Bone Meal With Vitamin D. Bulk
300450	Cabalaimin Concentrate, Dosage
300450	Calciferol, Dosage
300450	Calcium Pantothenate, Dosage
300450	Clusivol
300450	Cod Liver Oil With Viosterol, Medicinal, Dosage
300450	Eldec
300450	Elixirs And Sirups, Novita'vitamins B1, B2 And Niacin
300450	Engran
300450	Ferrous Ascorbate, Dosage
300450	Ferrous Sulfate With B Vitamins Dosage
300450	Folic Acid, Dosage
300450	Folvite
300450	Folvite Elixir
300450	Gericaps
300450	Gerilets
300450	Geripans
300450	Geriplex
300450	Gevral, Dosage
300450	Hexa-Betalin
300450	Jelly, Royal (Bees), In Capsules (Without Vitamins)
300450	Medicaments Containing Vitamins
300450	Mi-Cebrin
300450	Multicebrin Perles
300450	Multivitamin Preparations, Dosage
300450	Multivitamins Combined With Minerals Or Other Nutrients, Dosage
300450	Multivitamins, Dosage
300450	Natabec
300450	Niacin, Dosage
300450	Nicotinic Acid Diethylamide, Dosage
300450	Nicotinic Acid, Dosage
300450	Oleovitamin A And D, Dosage
300450	Panthenol, Dosage
300450	Pantohenyl Alchol, Dosage
300450	Pantothenic Acid, Dosage
300450	Poly-Vi-Sol
300450	Riboflavin, Dosage
300450	Royal Jelly With Vitamins, Dosage
300450	Single Vitamin Preparations Dosage
300450	Single Vitamins Combined With Minerals Or Other Nutrients Dosage
300450	Sodium Ascorbate, Dosage

300450	Sodium-D-Pantothenate, Dosage
300450	Thaimin Hydrochloride (Vitamin B1), Dosage
300450	Thaimin Mononitrate, Dosage
300450	Thergran Capsules
300450	Thiamin Chloride, Dosage
300450	Thiamin Hydrobromide, Dosage
300450	Thyloquinone
300450	Tocopherex
300450	Tri-Vi-Sol
300450	Trophite Liquid (With Vitamins), Dosage
300450	Vi-Penta
300450	Vi-Penta Perles
300450	Vi-Penta Solution
300450	Vi-Syneral
300450	Vigran (Multivitamin)
300450	Viosterol
300450	Vitamin Preparations, Single, Dosage
300450	Vitamins, Single, Combined With Minerals Or Other Nutrients, Dosage
300450	Viterra
300450	Wafers, Vitamin D
300450	Wheat Germ Oil Capsules
300450	Yeast Powder, Brewers' Debittered (B-Complex Mixture), Dosage
300450	Yeast, Brewers' Flavored, Dosage
300490	2-Acetylamino-1, 3, 4-Thiadiazole-5-Sulfonamide, Dosage
300490	Acetazolamide, Dosage
300490	Aerosol Ot (Pharmaceutical Grade Dioctyl Sodium Sulfosuccinate)
300490	Agarol
300490	Alba-Gar
300490	Aldrox
300490	Alka Zane
300490	Alka-Seltzer
300490	Alkaline Effervescent
300490	Alloxan, Dosage
300490	Alminate
300490	Aloc
300490	Aloin, Dosage
300490	Alophen
300490	Alucol
300490	Aludrox
300490	Aluminum Phosphate Gel U.S.P., Dosage
300490	Aminopterin, Dosage
300490	Amphojel
300490	Antacids, Dosage
300490	Anti-Infective Preparations, Dosage, Veterinary
300490	Antineoplastic Preparations, Dosage, For Human Use
300490	Antiseptic Preparations, Dosage, Veterinary
300490	Bassoran
300490	Bilifuine

300490	Bismuth Gallate, Dosage
300490	Bisodol
300490	Calcium Carbonate, Dosage
300490	Caloric Balance Affecting Preparations, Dosage
300490	Caloric Balance Affecting Preparations, N.E.S.O.I., Dosage
300490	Carbamide, Dosage
300490	Carlsbad Salts
300490	Casanthranol
300490	Cascara (Liquid Aromatic), Dosage
300490	Cascara Powdered Extract Dosage
300490	Cascara Sagrada Extract, Dosage
300490	Castor Oil, Dosage Or Packed For Retail Sale
300490	Cmc (Sodium Carboxymethylcellulose), Dosage
300490	Colace Capsules And Liquid
300490	Colopo
300490	Creamalin, Dosage
300490	Disposable Enemas
300490	Diuretic Preparations, Dosage
300490	Dorbane
300490	Effervescent Salts (Laxative), Dosage
300490	Electrolytic Balance Affecting Preparations, Dosage
300490	Enemas, Disposable
300490	Eno Fruit Salts
300490	Epsom Salts, Dosage
300490	Ergosterin, Irradiated, Preparations, Bulk
300490	Feen-A-Mint
300490	Fernmantol
300490	Fig Sirup
300490	Fletchers' Castoria
300490	Gelusil
300490	Glycerine Suppositories
300490	Granulate Salt, Dosage
300490	Hepalina
300490	Hepatin
300490	Hepatone
300490	Immunosuppressive Preparations, Dosage, For Human Use
300490	Kolantyl Gel
300490	Konsyl
300490	Kruschen Salts
300490	Lapactic Pills
300490	Lax Special
300490	Laxatives, Dosage
300490	Laxol
300490	Lytren
300490	Maolin
300490	Medicaments Containing Antigens Or Hyaluronic Acid Or Its Sodium Salt
300490	Medicaments Primarily Affecting The Central Nervous System
300490	Medicaments Primarily Affecting The Digestive System

300490	Melcalose
300490	Mercaptomerin Sodium, Dosage
300490	Mercurhydrin With Ascorbic Acid, Dosage
300490	Mersalyn (Mersalyl-Theophylline)
300490	Metamucil
300490	Milk Of Magnesia, Dosage
300490	Modane
300490	Mrs. Winslow's Sirip
300490	Mucara
300490	Mucilose
300490	Mycolactine Sauvin
300490	Neohydrin, Dosage
300490	Neoloid
300490	Partola
300490	Pepto-Bismol
300490	Petrolagar
300490	Phenolphthalein With Emulsified Mineral Oil, Dosage
300490	Phosphajel
300490	Picot Salts
300490	Plantamucin
300490	Prulose
300490	Pursin
300490	Resin Podophyllum, Dosage
300490	Rhubarb Root, Dosage
300490	Robalate
300490	Sal Hepatica
300490	Salygran-Theophylline
300490	Santonin Calomel
300490	Saraka
300490	Senokot
300490	Serutan
300490	Siblin
300490	Sodium Bicarbonate, Medicinal, Dosage
300490	Thiomerin, Dosage
300490	Tums
300490	Ventilbre
300490	Veracolate
300490	Water Balance Affecting Preparations, Dosage