

Canada: Market to Explore in Pharmaceutical industry

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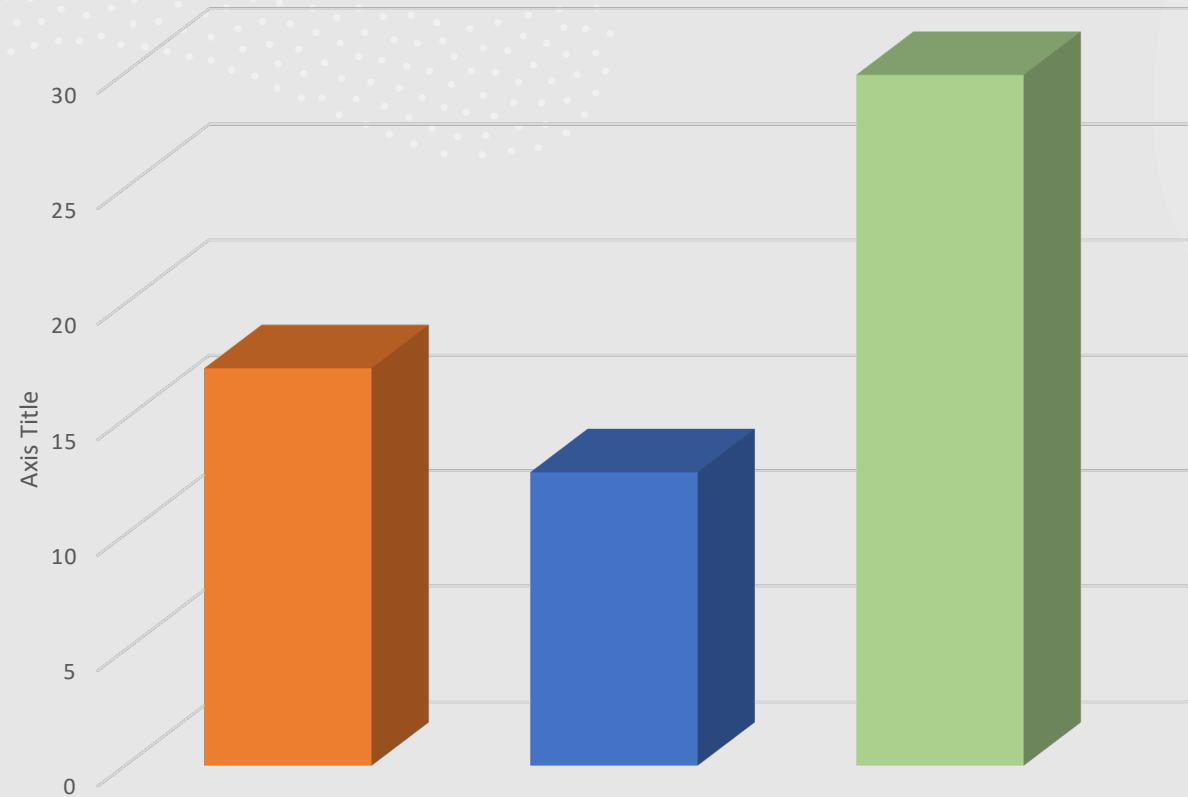
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Canada Market view and prospects

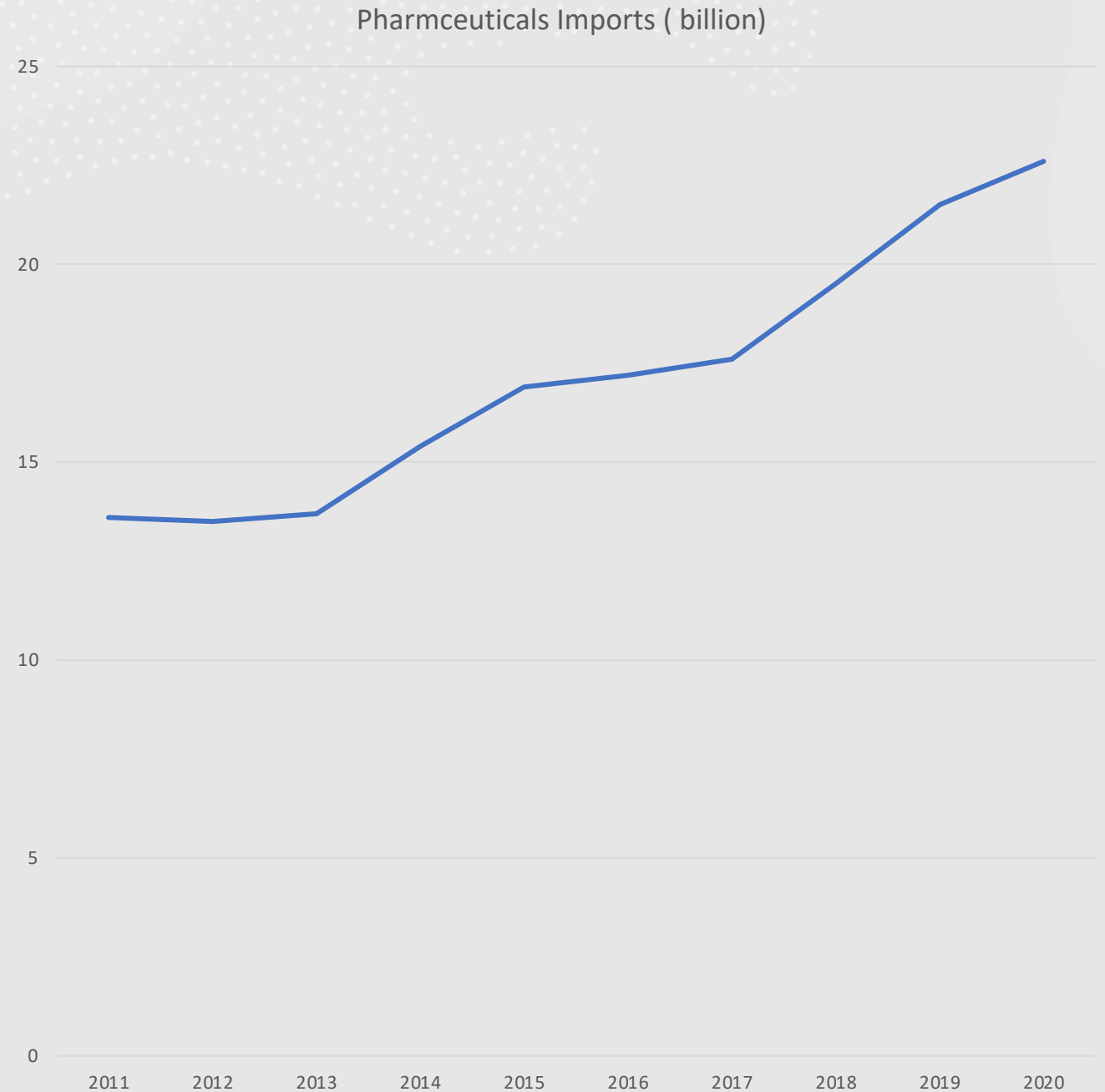
- Canada have a 2.1 % of Global market (Making 9th largest market)
- Annual growth has remained 5.1 %
- Brand Market: 81.3 % Canadian sales by Value
- Prescription by quantity: 27.1 %
- Opportunity for Indian Company
 - GENERIC DRUGS
 - BIOLOGICS
 - SPECIAL ACCESS PROGRAM
 - NNHPD
 - MEDICAL DEVISE
 - CANNABIS (EXPECTED 8.6 BN DOLLAR BY 2026)

Canadian Manufactures Sales

Canadian Manufacture Sales of Patented and Non Patented Drugs (\$ Billions)



Total Canadian Pharmaceutical Imports



Leading Pharmaceutical Companies In Canada

Rank	Leading Companies	Total Sales (Billion)	Market Share
1	J&J	4.19	13.3
2	Abbvie	1.62	5.10
3	Novartis	1.60	5.10
4	Merck	1.59	5.00
5	Pfizer	1.36	4.30
6	Apotex	1.22	3.90
7	Bayer	1.20	3.80
8	Roche	1.17	3.70
9	Astrazeneca	1.13	3.60
10	GSK	1.07	3.40

Leading Pharmceutical Products

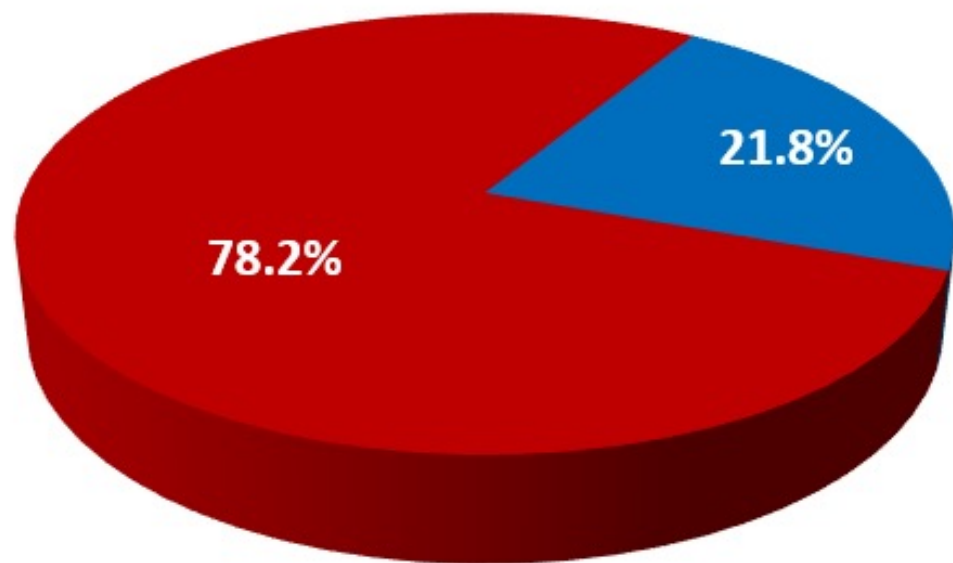
Rank	Leading Products	Therapeutics subclasses	Generic	Total Sales (Millions)
1	Remicade	Anti-arthritic	Infliximab	1153
2	Humira	Anti-arthritic	Adalimumab	931
3	Eylea	Opth	Aflibercept	560
4	Stelara	AutoImmune	Ustekinumab	476
5	Epclusa	LiverHealth	sofosbuvir / velpatasvir	385
6	Elquis	Blood Thinner	Apixaban	331
7	Imbruvica	Autoimmune	ibrutinib	323
8	Lucentis	Ophthalmic	ranibizumab	318
9	Keytruda	AutoImmune	pembrolizumab	308
10	Xarelto	Blood thinner	RIVAROXABAN	269

In Canada Health Care Expenditure (\$ Billions)

Year	Total Health Exp.	On Drugs
2011	199.3	33.0
2012	207.4	33.4
2013	212.2	33.6
2014	218.4	33.9
2015	227.9	35.6
2016	237.2	37.0
2017	245.6	38.2
2018	254.6	38.9
2019	265.5	40.3
2020	289.6	42.9

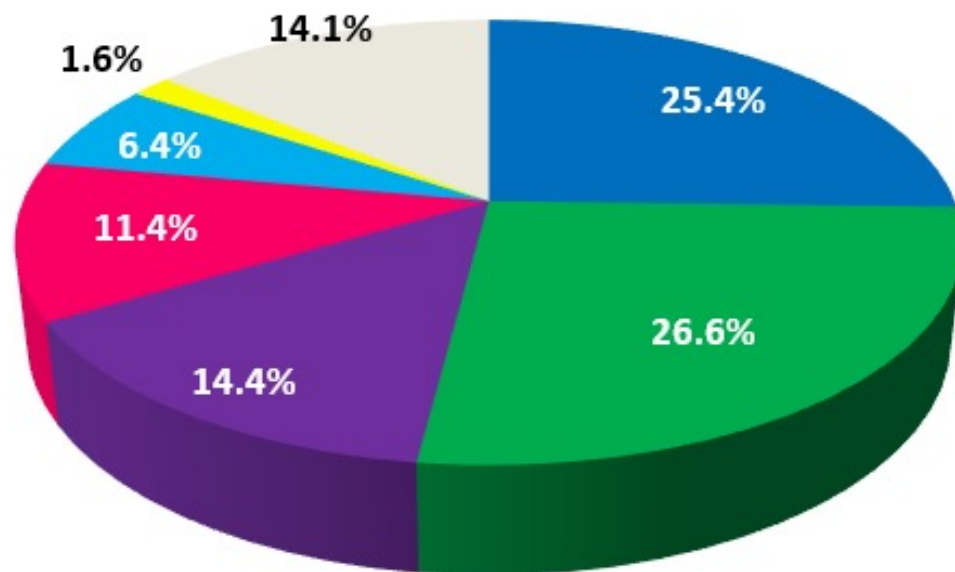
Canadian Pharmaceutical Market

**Total Market \$26.4
Billion CDN**



■ BRAND ■ GENERIC

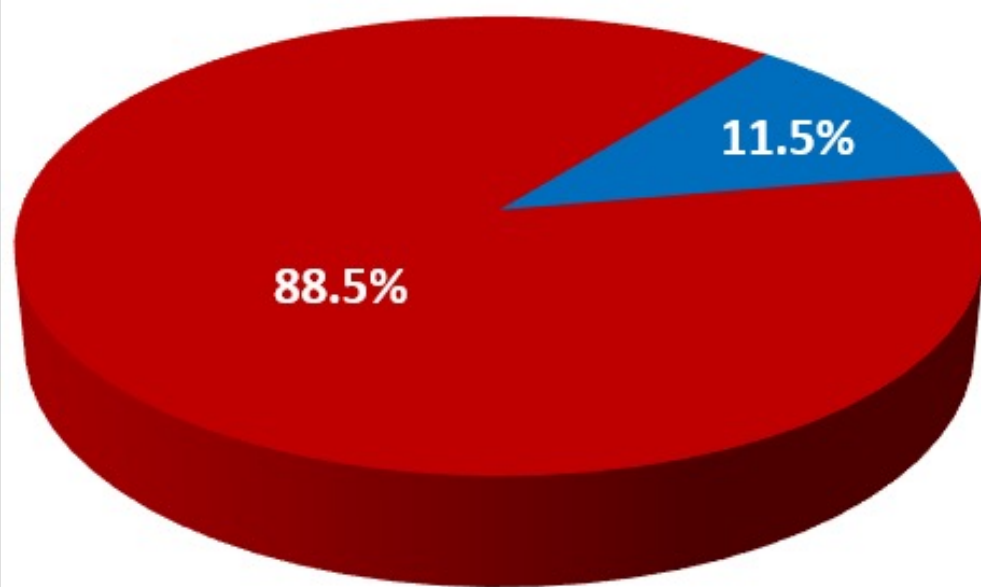
**Generic Market \$5.7
Billion CDN**



■ APOTEX INC
■ SANDOZ CANADA INC
■ MYLAN PHARMA
■ OTHER
■ TEVA + ACTAVIS
■ PHARMASCIENCE
■ RANBAXY PHARMA CAN

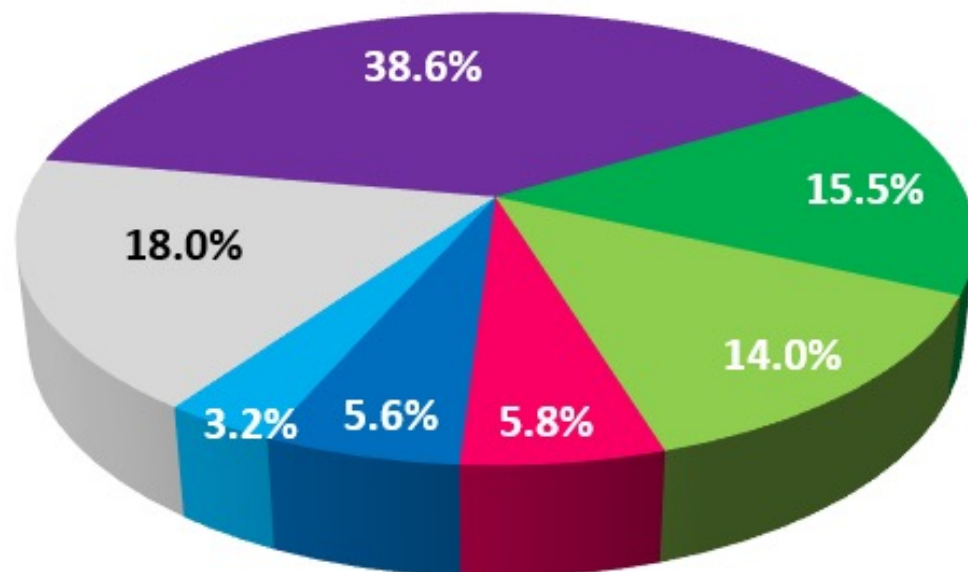
Canadian Hospital Pharmaceutical Market

**Total Market \$2.94
Billion CDN**



■ BRAND ■ GENERIC

**Generic Market
\$337.8 Million CDN**



■ SANDOZ CANADA INC ■ TEVA + ACTAVIS ■ HOSPIRA
■ PHARMASCIENCE ■ APOTEX INC ■ FRESENIUS KABI CDN
■ OTHER

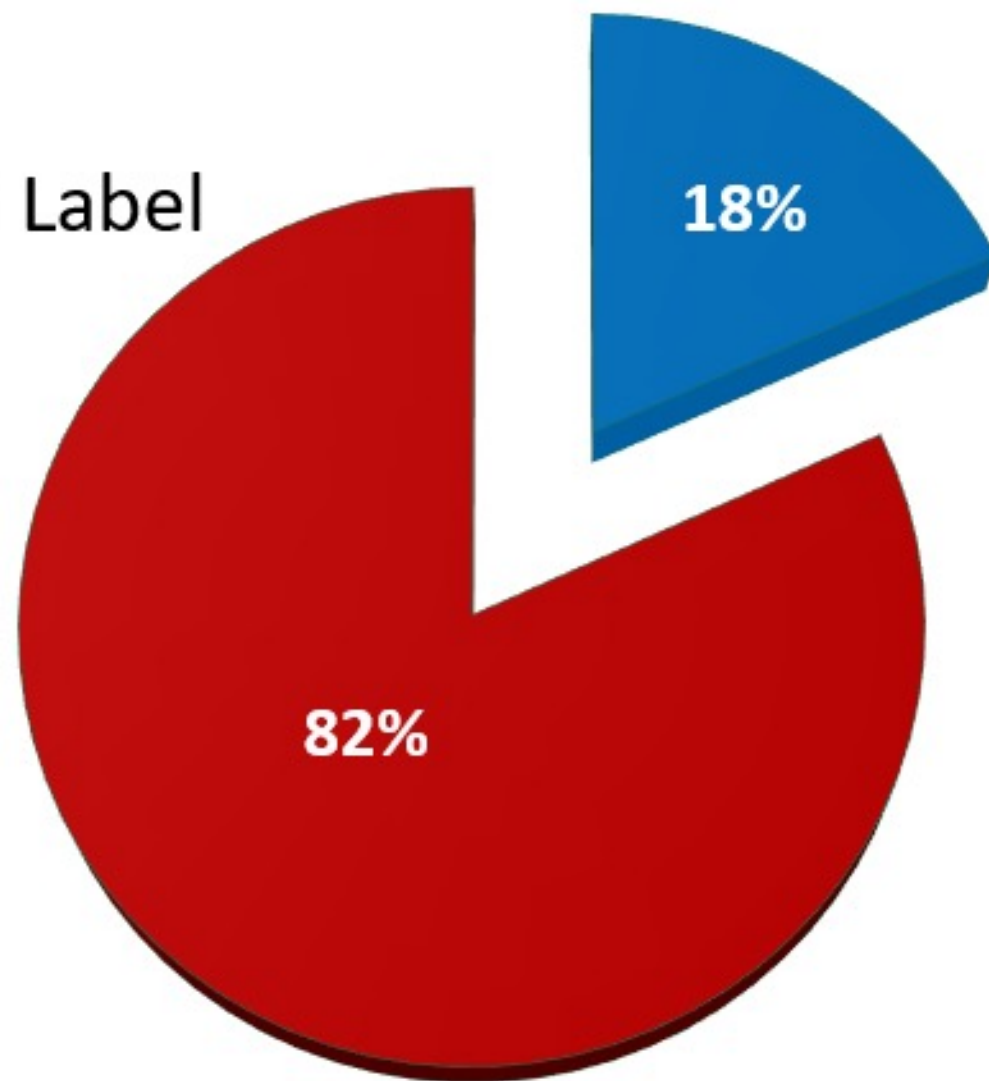
Source: IMS Feb 2017 *Includes hospital sales only *MAT time period

CANADIAN OTC Market

Total Market : \$2.85 Billion

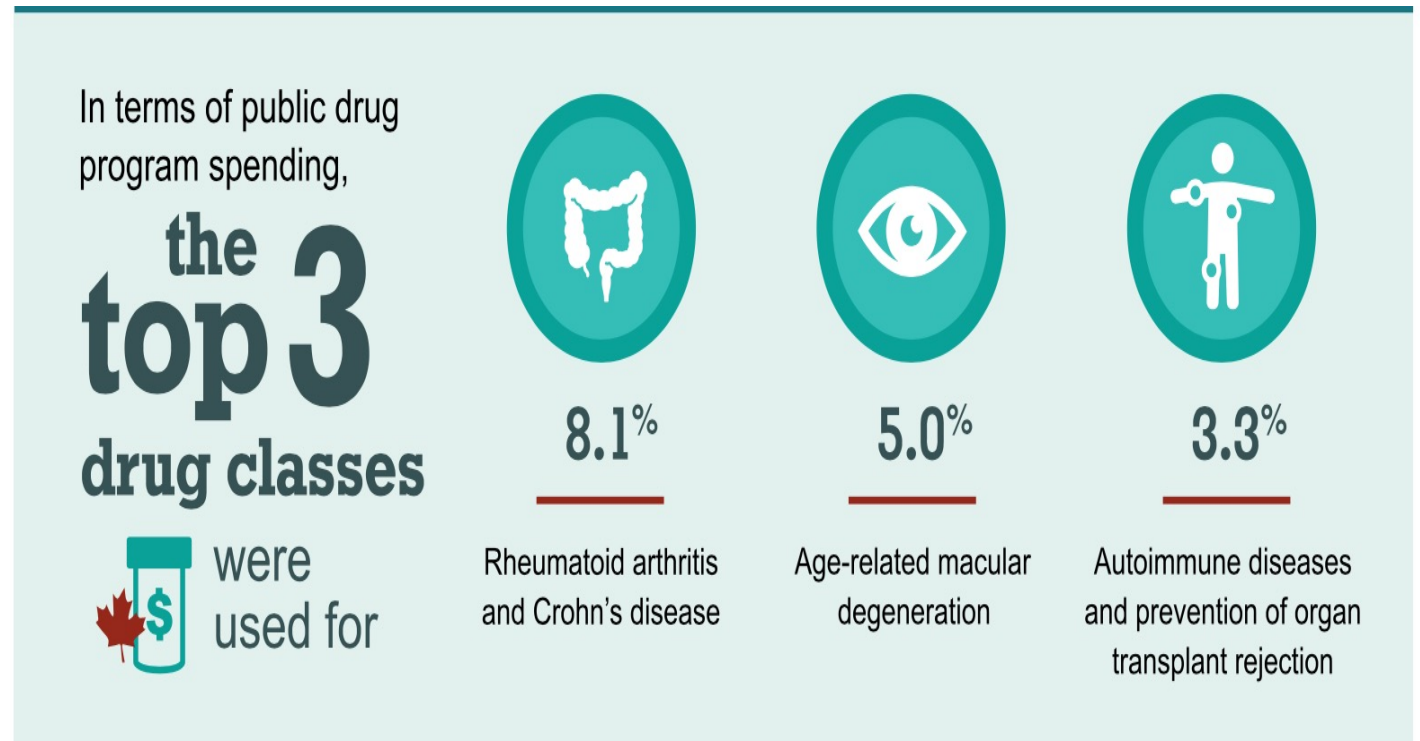
■ Private Label

■ OTC



* IMS-Brogan 2017

Prescribed drug spending in Canada, 2021



2020 Canadian Pharmaceutical Market Highlights

COMBINED RETAIL AND HOSPITAL PURCHASES = \$32.5 BILLION UP 4.6%

BRAND GROWTH (+4.6%) GENERICS GROWTH (+4.9%)

Source: IQVIA. Canadian Drugstore and Hospital Audit. MAT December 2020



LEADING THERAPEUTIC CLASSES IN RETAIL AND HOSPITAL PURCHASES, 2020

RANK	THERAPEUTIC CLASS	TOTAL PURCHASES (\$ MILLIONS)	% CHANGE OVER 2019
1	ONCOLOGY	\$4,235	+16.5
2	ANTIARTHRITICS	\$3,307	+3.8
3	DIABETES THERAPY	\$2,412	+14.1
4	PSYCHOTHERAPEUTICS	\$2,356	+7.0
5	IMMUNOLOGIC AGENTS	\$1,985	+23.7
6	RESPIRATORY THERAPY	\$1,731	+7.4
7	CARDIOVASCULARS	\$1,413	+4.1
8	ANTI-VIRALS	\$1,380	-15.7
9	OPHTHALMICS	\$1,312	-3.6
10	NEUROLOGICAL DISORDERS	\$1,274	+3.0

Source: IQVIA. Canadian Drugstore and Hospital Audit. MAT Dec 2020 DM

RETAIL PHARMACY CHANNELS

CHAINS & BANNERS: 7,396

FOOD/MASS MERCHANDISERS: 1,610

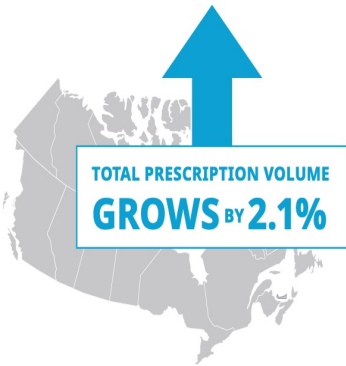
INDEPENDENTS: 2,193

2020 TOTAL: 11,199

Source: IQVIA. Territorial Sales Analysis MAT Dec 2020 DM



2020 Canadian Pharmaceutical Market Highlights



Source: IQVIA. Canadian CompuScript. MAT December 2020

RETAIL PHARMACIES DISPENSED

758.1 MILLION PRESCRIPTIONS

GENERICS = 72.9% OF THE MARKET, UP 2.3%

BRAND = 27.1% OF THE MARKET, UP 1.5%



Source: IQVIA. Canadian CompuScript. MAT December 2020

TOP 10 MOLECULES BY TOTAL ETHICAL PRESCRIPTIONS

RANK	PRODUCT	% CHANGE OVER 2019
1	ROSUVASTATIN	+11.7
2	LEVOTHYROXINE	+6.5
3	PANTOPRAZOLE	+8.1
4	ATORVASTATIN	+4.2
5	AMLODIPINE	+11.0
6	CHOLECALCIFEROL	+11.4
7	METFORMIN	+6.6
8	ACETYSALICYLIC ACID	-4.3
9	METHADONE	-9.8
10	BISOPROLOL	+3.9

Source: IQVIA. Canadian CompuScript. MAT December 2020

PHARMACEUTICAL TRENDS

Top 10 Therapeutic Classes* in Canada, 2020

Rank	Therapeutic class	Total prescriptions* 2020 (000s)	% Change over 2019
1	Cardiovasculars	105,750	4.9
2	Psychotherapeutics	104,821	4.2
3	Antihyperlipidemic agents	52,593	7.4
4	Analgesics	44,001	-1.4
5	Diabetes therapy	43,027	9.1
6	Gastrointestinal/Genitourinary	42,615	3.3
7	Neurological disorders	38,233	2.2
8	Vitamins	23,648	8.5
9	Thyroid therapy	23,494	6.6
10	Hormones	23,491	-3.8

PHARMACEUTICAL TRENDS

Top 20 Dispensed Drugs in Canada, 2020

Rank	Name of drug	Use	Total prescriptions* 2020 (000s)	% Change over 2019
1	SYNTHROID	Hypothyroidism	20,798	6.7
2	METHADOSE	Narcotic analgesic	10,520	-13.4
3	D-TABS	Vitamin	5,957	29.7
4	ELIQUIS	Anticoagulant	4,738	-5.6
5	BISOPROLOL	Antihypertensive	4,595	17.1
6	ASA, JMP	Pain relief	4,274	-5.5
7	DEXILANT	Esophagitis	4,189	7.4
8	SANDOZ-AMLODIPINE	Antihypertensive	4,148	8.8
9	SANDOZ METFORMIN	Anti-diabetic	4,027	-3.6
10	TEVA-FUROSEMIDE	Diuretic	3,904	-12.2
11	APO-ATORVASTATIN	Antihypertensive	3,881	2.4
12	TEVA-SALBUTAMOL	Bronchodilator	3,825	-2.1
13	PMS-ROSUVASTATIN	Cholesterol lowering	3,522	31.2
14	AURO-ROSUVASTATIN	Cholesterol lowering	3,430	29.5
15	WEB-VITAMIN D	Vitamin	3,425	38.5
16	XARELTO	Anticoagulant	3,209	7.9
17	SANDOZ CANDERSARTAN	ACE inhibitor	3,163	19.1
18	AMLODIPINE	Antihypertensive	3,102	30.0
19	PMS-CLONAZEPAM-R	Anti-anxiety	3,069	-0.4
20	SANDOZ PANTOPRAZOLE	Proton pump inhibitor	3,040	-16.7

PHARMACEUTICAL TRENDS

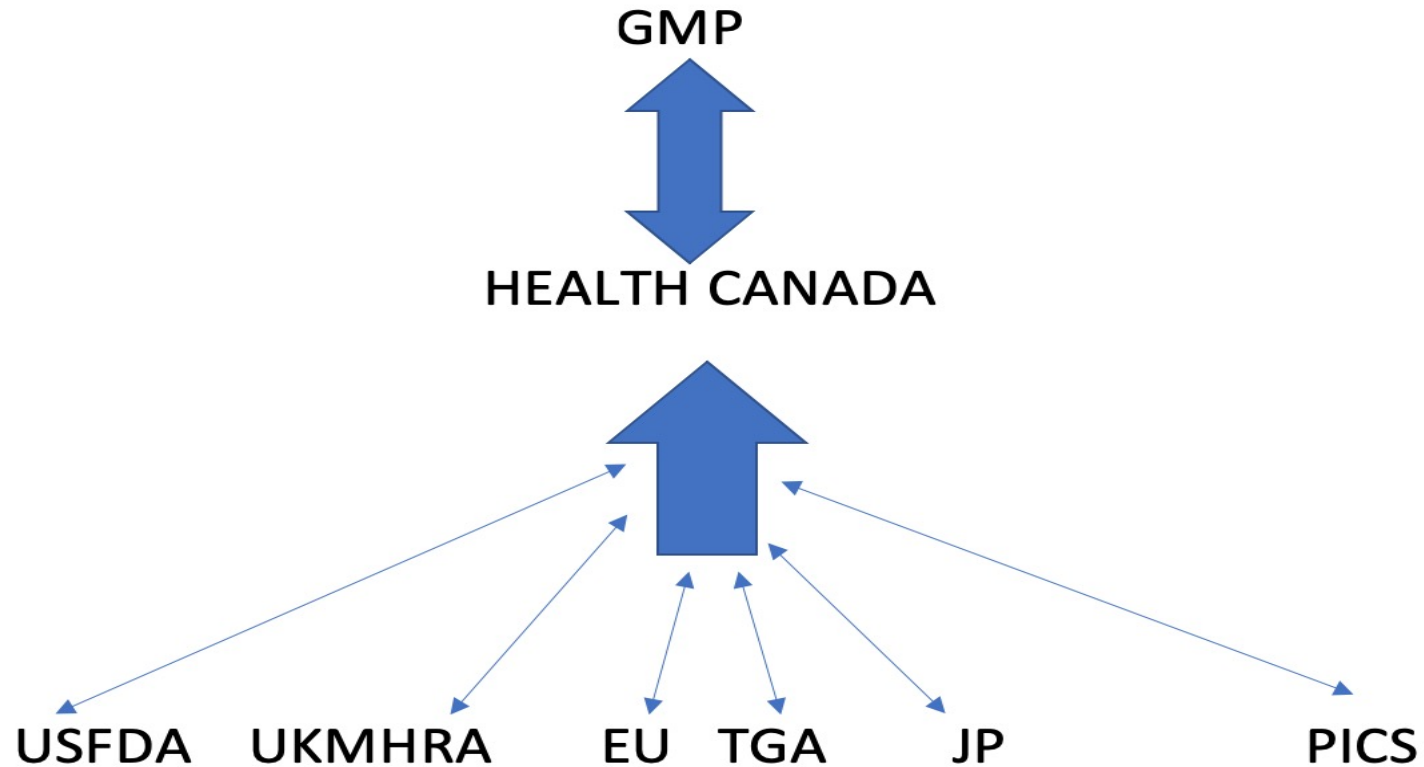
Top 10 Therapeutic Classes by Hospital Purchases, Canada, 2020

Rank	Therapeutic class	Hospital purchases (\$000)	% Change over 2019
1	Oncology	2,603,532	15.0
2	Biologicals	454,574	-11.1
3	Hemostatic modifiers	243,685	23.4
4	Hematinics	235,085	4.3
5	Anti-virals	234,451	-0.9
6	Anti-infectives, systemic	135,167	-3.0
7	Neurological disorders	96,620	-6.1
8	Psychotherapeutics	92,190	-1.5
9	Immunologic agents	86,075	-6.3
10	Diverse ethics	79,300	9.6

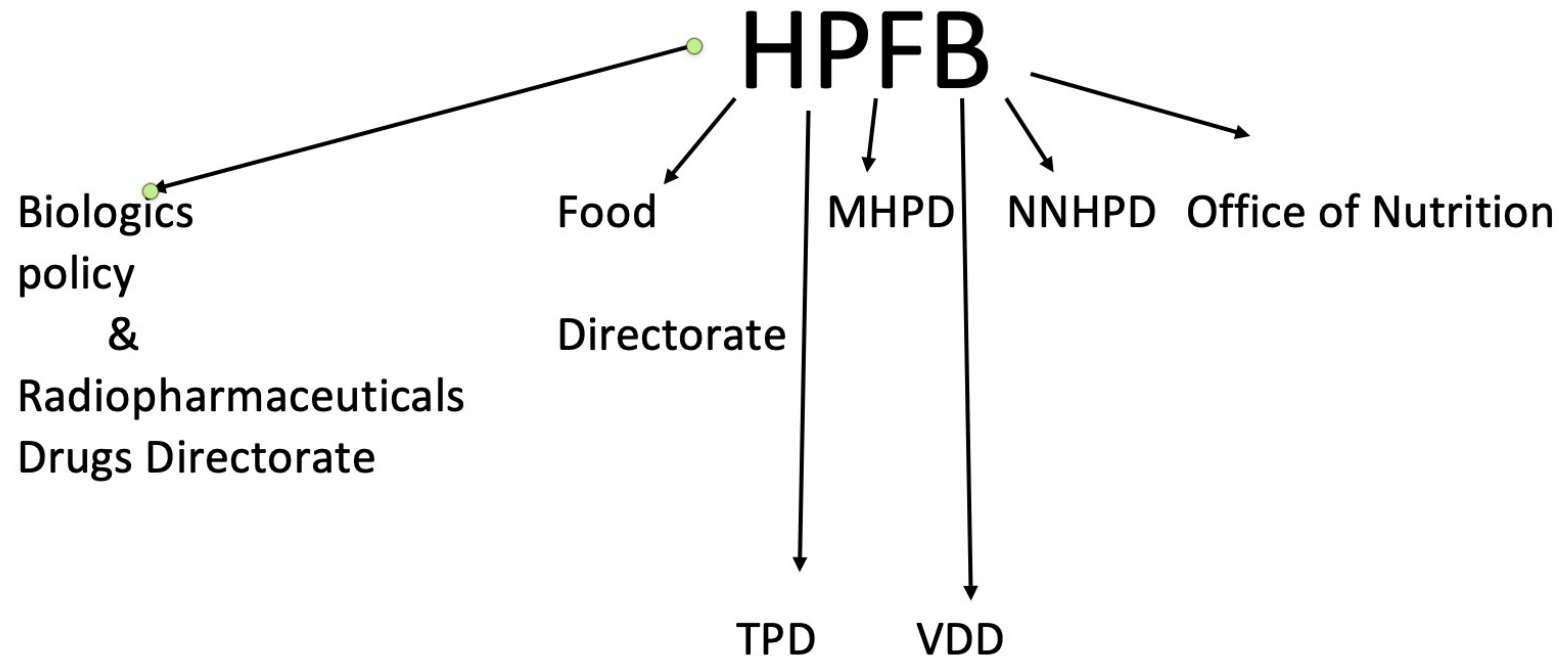
Top 10 Categories of Over-the-Counter Medication Sales in Canada, 2020

Rank	Category	Sales in \$ 52 week period, ended April 10, 2021	% change vs. 2019
1	Natural health supplements	616,690,000	1
2	Headache and migraine relief	576,884,000	-15
3	Vitamins	538,689,000	9
4	Energy & nutrition products	394,552,000	4
5	Allergy and sinus relief products	249,355,000	2
6	Medical nutritional supplements	227,963,000	7
7	Laxatives	192,033,000	9
8	Upset stomach remedies	188,910,000	1
9	Antismoking products	167,661,000	2
10	First aid preparations	156,975,000	1

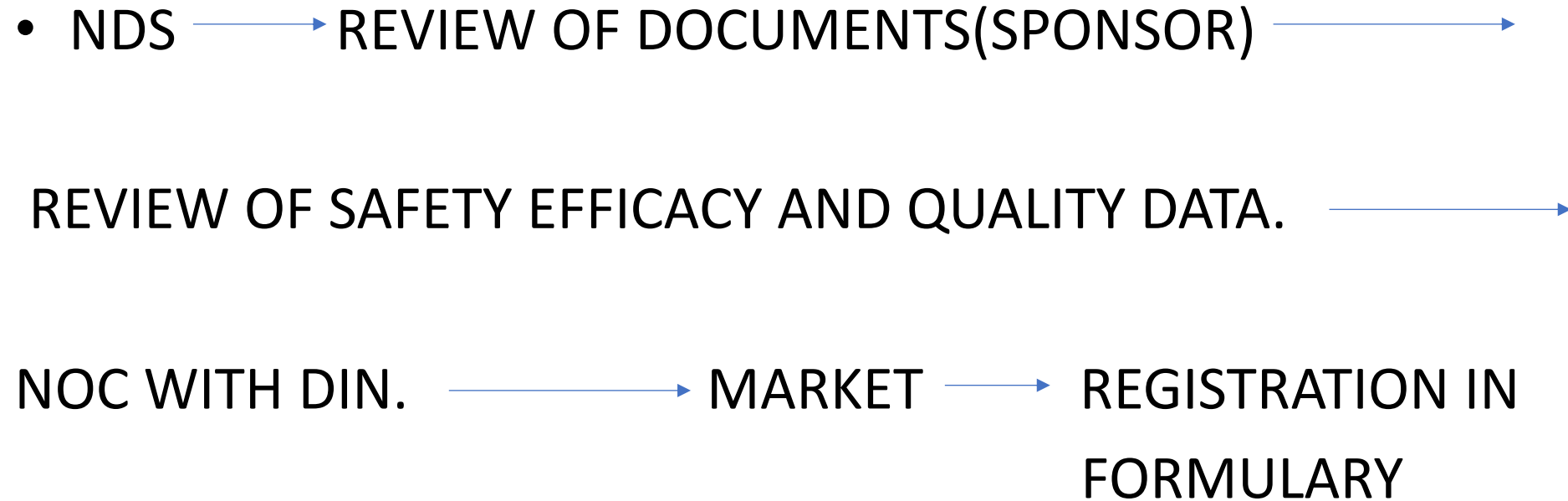
Regulatory Status of the Canada (Part of MRA)



HEALTH CANADA PROCESS



HPFB





ELON MUSK SAID

Instead of baby showers,

Let's host business showers.

When a friend starts a business,
we all come together, celebrate
them and **bring resources for
their business start.**



ELON MUSK

For any query

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