efpia

European Federation of Pharmaceutical Industries and Associations

The Pharmaceutical Industry in Figures

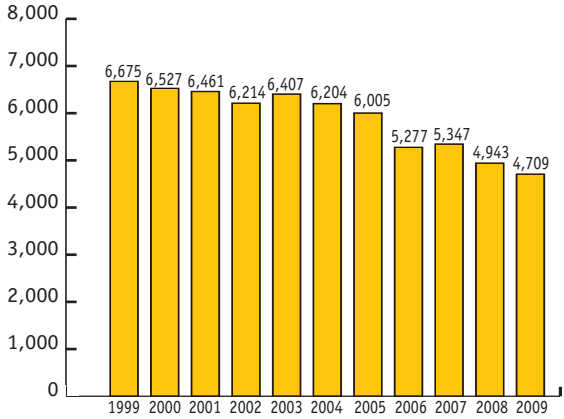
Key Data 2012

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

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

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

TOTAL NUMBER OF DEATHS DUE TO HUMAN IMMUNODEFICIENCY VIRUS [HIV] DISEASE IN EUROPE (EU-27)



Source: Eurostat, May 2012

THE PHARMACEUTICAL INDUSTRY: A KEY ASSET TO THE EUROPEAN ECONOMY

As well as driving medical progress by researching, developing and bringing to patients new medicines that will improve health and the quality of life around the world, the research-based pharmaceutical industry is a key asset of the European economy. It is one of Europe's top performing high-technology sectors.

INDUSTRY (EFPIA Total)	1990	2000	2010	2011
Production	63,010	123,793	200,050	205,000 (e)
Exports (1)(2)	23,180	90,935	276,357	290,000 (e)
Imports	16,113	68,841	204,824	210,000 (e)
Trade balance	7,067	22,094	71,533	80,000 (e)
R&D expenditure	7,766	17,849	27,796	27,500 (e)
Employment (units)	500,879	536,733	663,503	660,000 (e)
R&D employment (units)	76,126	88,397	117,191	116,000 (e)
Pharmaceutical market value at ex-factory prices	41,147	86,704	153,373	157,300 (e)
Pharmaceutical market value at retail prices	64,626	140,754	222,453	228,100 (e)
Payment for pharmaceuticals by statutory health insurance systems (3)	40,807	76,909	120,650	122,000 (e)

Values in € million unless otherwise stated
(1) Data relate to EU-27, Norway and Switzerland since 2005 (EU-15 before 2005); Croatia included since 2010
(2) Data relating to total exports and total imports include EU-27 intra-trade (double counting in some cases)
(3) Since 1998 data relate to ambulatory care only

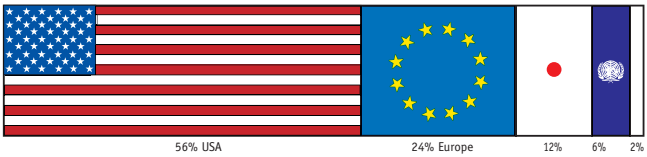
Source: EFPIA member associations (official figures) - (e): EFPIA estimate; Eurostat (EU-27 trade data 1995-2011)

MAIN TRENDS

The research-based pharmaceutical industry can play a critical role in restoring Europe to growth. In 2011 it invested an estimated € 27,500 million in R&D in Europe. It directly employs 660,000 people and generates three to four times more employment indirectly – upstream and downstream – than it does directly. However, the sector faces real challenges. Besides the additional regulatory hurdles and escalating R&D costs, the sector has been severely hit by the impact of fiscal austerity measures introduced by governments across much of Europe in 2010 and in 2011.

- There is rapid growth in the market and research environment in emerging economies such as Brazil, China and India, leading to a migration of economic and research activities outside of Europe to these fast-growing markets. In 2011 the Brazilian and Chinese markets grew by more than 20% (20.0% and 21.9% respectively) compared with an average market growth of 2.6% for the five major European markets and 3.6% for the US market (source: IMS).
- In 2011, North America accounted for 41.8% of world pharmaceutical sales compared with 26.8% for Europe. According to IMS data, 56% of sales of new medicines launched during the period 2006-2010 were on the US market, compared with 24% on the European market.
- The fragmentation of the EU pharmaceutical market has resulted in a lucrative parallel trade. This benefits neither social security nor patients and deprives the industry of additional resources to fund R&D. Parallel trade was estimated to amount to € 5,100 million (value at ex-factory prices) in 2010.

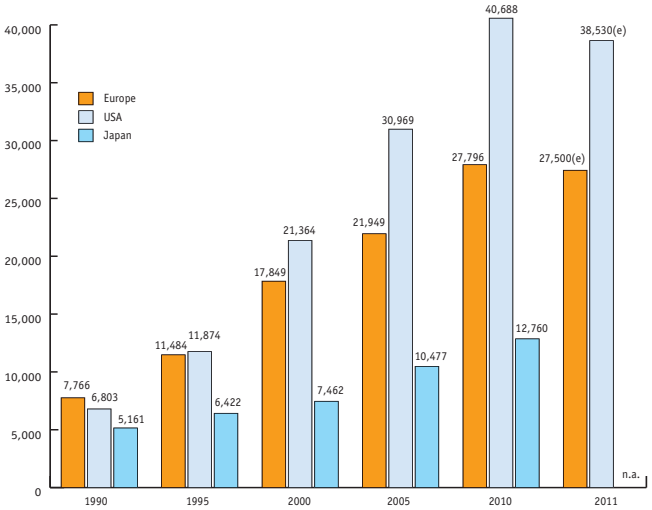
GEOGRAPHICAL BREAKDOWN (BY MAIN MARKETS) OF SALES OF NEW MEDICINES LAUNCHED DURING THE PERIOD 2006-2010



Note: New medicines cover all new active ingredients marketed for the first time on the world market during the period 2006-2010
Pharmerging comprises 17 countries ranked by IMS Health as high-growth pharmaceutical markets (Argentina, Brazil, China, Egypt, India, Indonesia, Mexico, Pakistan, Poland, Romania, Russia, South Africa, Thailand, Turkey, Venezuela, Vietnam and The Ukraine)

Source: IMS MIDAS December 2011

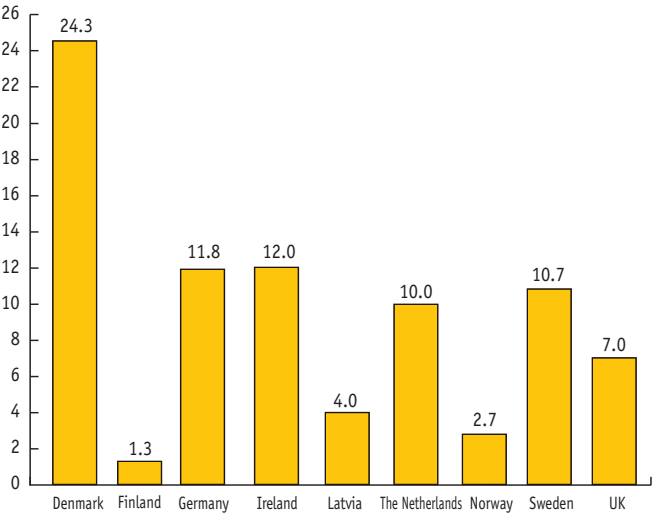
PHARMACEUTICAL R&D EXPENDITURE IN EUROPE, USA AND JAPAN (MILLION OF NATIONAL CURRENCY UNITS*), 1990-2011



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

Source: EFPIA member associations, PhRMA, JPMA

SHARE OF PARALLEL IMPORTS IN PHARMACY MARKET SALES (%) - 2010



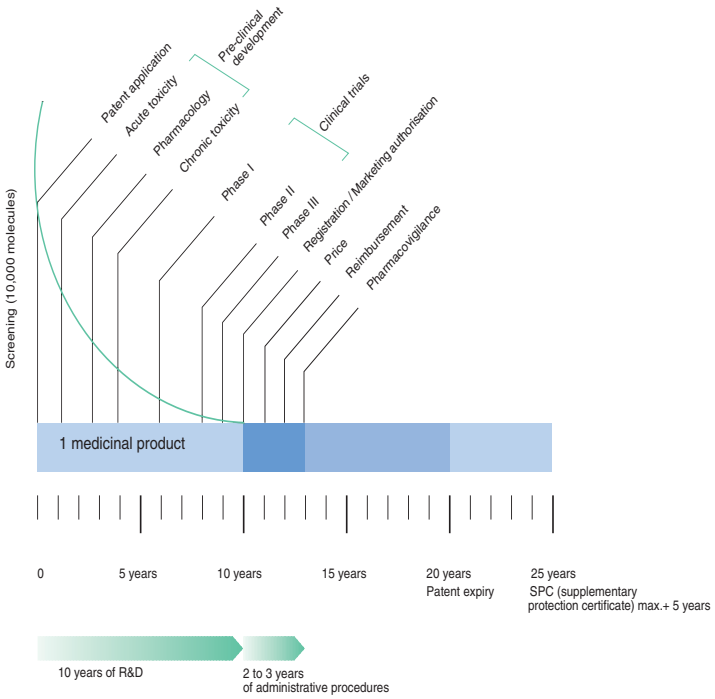
Source: EFPIA member associations (estimate)

PHARMACEUTICAL INDUSTRY RESEARCH & DEVELOPMENT IN EUROPE

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

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

PHASES OF THE RESEARCH AND DEVELOPMENT PROCESS



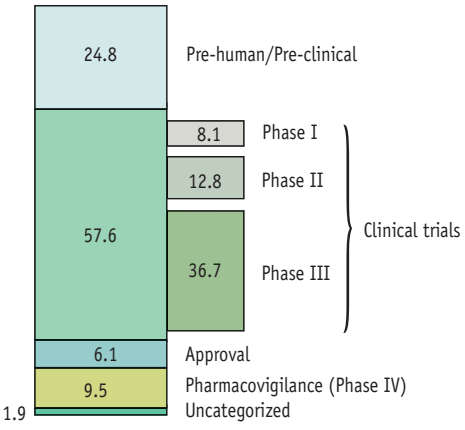
PHARMACEUTICAL INDUSTRY RESEARCH & DEVELOPMENT IN EUROPE

EFPIA 2010	€ million
Austria	190
Belgium	1,780
Bulgaria	1
Croatia	27
Cyprus	14
Czech Republic	49
Denmark	1,102
Estonia	n.a.
Finland	227
France	4,964
Germany	4,812
Greece	84
Hungary	151
Ireland	194
Italy	1,240
Latvia	n.a.
Lithuania	n.a.
Malta	n.a.
Netherlands	550
Norway	104
Poland	n.a.
Portugal	42
Romania	199
Serbia	n.a.
Slovakia	n.a.
Slovenia	91
Spain	966
Sweden	988
Switzerland	4,619
United Kingdom	5,402
Total	**27,796**

Note: The figures relate to the R&D carried out in each country.
Cyprus: 2007 data
Bulgaria, Czech Republic, France, Netherlands, Portugal: 2009 data
Belgium, Denmark, France, Greece, Ireland, Italy, Netherlands, Norway, Romania, Sweden (LIF members), Switzerland (Interpharma members): estimate

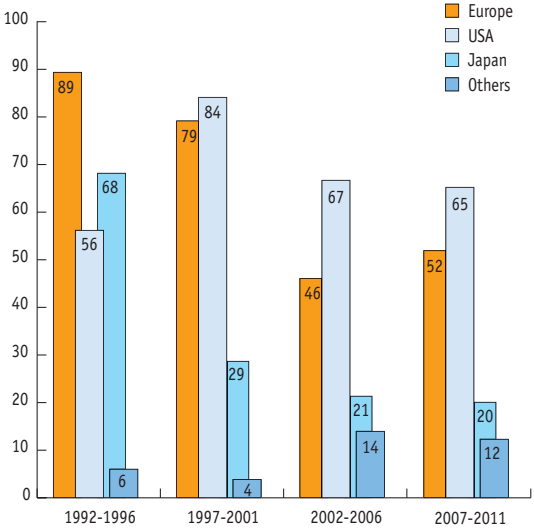
Source: EFPIA member associations (official figures)

ALLOCATION OF R&D INVESTMENTS BY FUNCTION (%)



Note: Percentages do not add due to rounding
Source: PhRMA, Annual Membership Survey 2012 (percentages calculated from 2010 data)

NUMBER OF NEW CHEMICAL OR BIOLOGICAL ENTITIES (1992-2011)

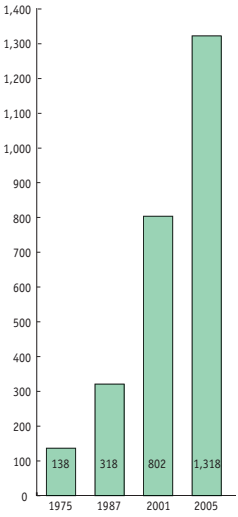


Source: SCRIP – EFPIA calculations (according to nationality of mother company)

IMPORTANCE OF PHARMACEUTICAL R&D

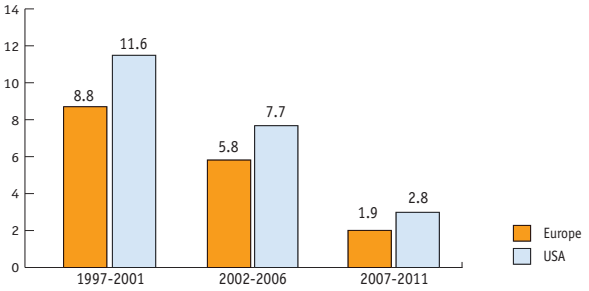
In 2010 the pharmaceutical industry invested about € 27,800 million in R&D in Europe. After a decade of strong US market dominance, which led to a significant shift of economic and pharmaceutical research activity towards the US during the period 1995-2005, Europe is now also facing increasing competition from emerging economies. Today there is rapid growth in the market and research environment in emerging economies such as Brazil, China and India, resulting in further migration of economic and research activities outside of Europe to these fast-growing markets. The geographical balance of the pharmaceutical market – and ultimately the R&D base – is likely to shift gradually towards emerging economies.

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



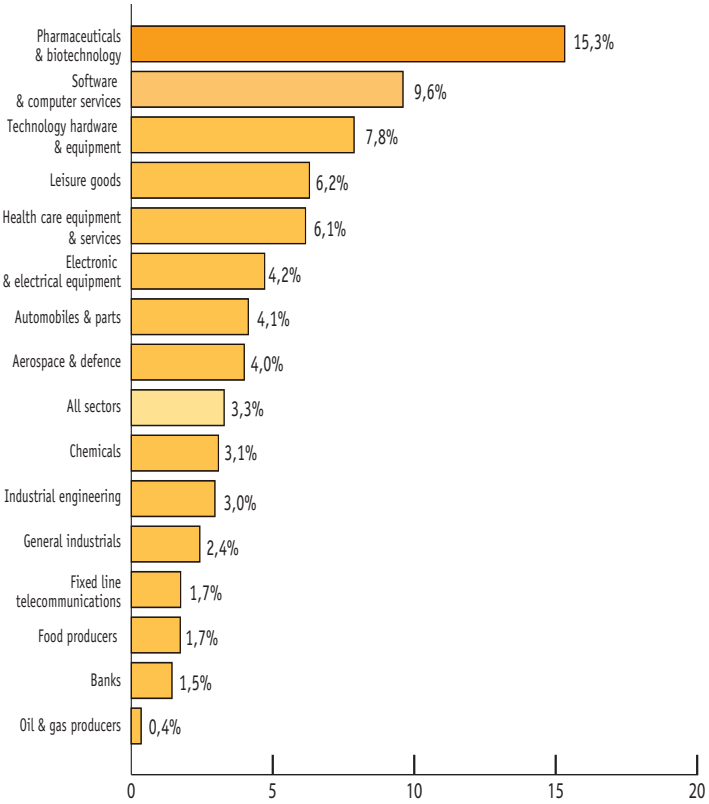
Source: J.A. DiMasi and H.G. Grabowski, 'The Cost of Biopharmaceutical R&D: Is Biotech Different?, Managerial and Decision Economics 28 (2007): 469-479

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



Source: EFPIA, PhRMA

RANKING OF INDUSTRIAL SECTORS BY OVERALL SECTOR R&D INTENSITY (R&D AS PERCENTAGE OF NET SALES – 2010)



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

Source: The 2011 EU Industrial R&D Investment Scoreboard, European Commission, JRC/DG Research & Innovation

According to EUROSTAT data, the pharmaceutical industry is the high technology sector with the highest value-added per person employed, well ahead of the average value for high-tech and manufacturing industries. The pharmaceutical industry is also the sector with the highest ratio of R&D investment to net sales. It amounts to approximately 3.5% of total EU manufacturing value-added and 19.1% of the total worldwide business R&D expenditure.

PHARMACEUTICAL PRODUCTION

EFPIA 2010	€ million
Austria	2,447
Belgium	6,815
Bulgaria	157
Croatia	383
Cyprus	180
Czech Republic	139
Denmark	6,985
Estonia	n.a.
Finland	1,195
France	23,485
Germany	26,888
Greece	910
Hungary	2,441
Ireland	19,700
Italy	24,996
Latvia	101
Lithuania	32
Malta	34
Netherlands	6,180
Norway	679
Poland	2,439
Portugal	1,679
Romania	280
Serbia	n.a.
Slovakia	n.a.
Slovenia	1,375
Spain	14,387
Sweden	6,954
Switzerland	29,195
United Kingdom	19,994
Total	**200,050**

Note: All data based on SITC 54
Belgium: 2010 provisional data; Czech Republic, Lithuania, Slovenia: 2009 data; Norway, Romania: 2007 data; Malta: 2004 data
Czech Republic, Denmark, France (source: INSEE), Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland: estimate
Bulgaria, Croatia, Cyprus, France, Germany, Ireland, Latvia, Norway, Poland, Switzerland: veterinary products excluded

Source: EFPIA member associations (official figures)

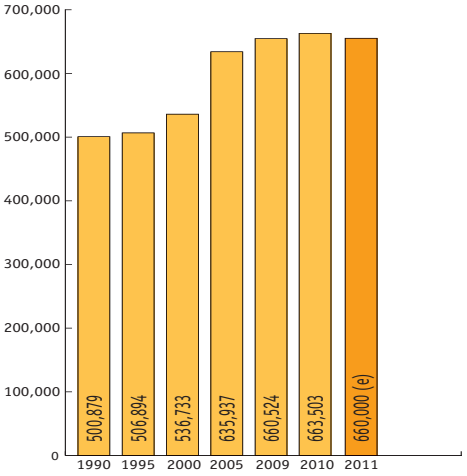
EMPLOYMENT IN THE PHARMACEUTICAL INDUSTRY

EFPIA 2010	Units
Austria	10,705
Belgium	31,536
Bulgaria	3,053
Croatia	6,000
Cyprus	1,140
Czech Republic	2,300
Denmark	20,223
Estonia	450
Finland	5,333
France	97,645
Germany	103,208
Greece	12,500
Hungary	22,400
Ireland	25,000
Italy	66,700
Latvia	n.a.
Lithuania	2,300
Malta	445
Netherlands	16,900
Norway	4,200
Poland	31,000
Portugal	9,580
Romania	20,000
Serbia	n.a.
Slovakia	2,000
Slovenia	11,500
Spain	39,932
Sweden	13,773
Switzerland	36,680
United Kingdom	67,000
Total	**663,503**

Note: Austria, Czech Republic, Estonia: 2009 data; Cyprus, Netherlands: 2007 data; Malta: 2004 data
Belgium, France, Greece, Ireland, Italy, Malta, Netherlands, Norway, Poland, Romania, Slovenia, Sweden, Switzerland, United Kingdom: estimate

Source: EFPIA member associations (official figures)

EMPLOYMENT IN THE PHARMACEUTICAL INDUSTRY (1990-2011)

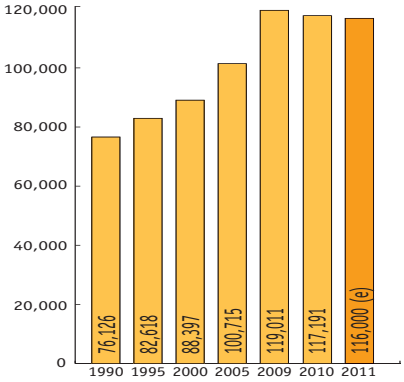


Note: Data includes Croatia and Lithuania (since 2010), Estonia and Hungary (since 2009), Czech Republic (since 2008), Cyprus (since 2007), Romania & Slovakia (since 2005), Malta, Poland and Slovenia (since 2004)

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

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

EMPLOYMENT IN PHARMACEUTICAL R&D (1990-2011)



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

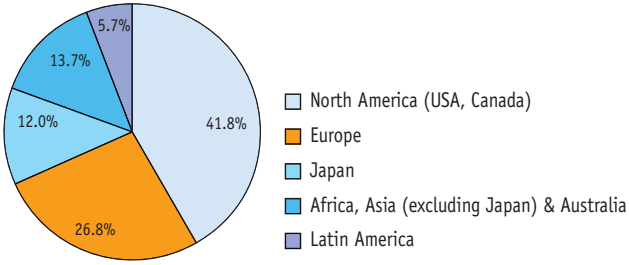
Bulgaria, Croatia, Cyprus, Greece, Latvia, Lithuania, Malta, Poland, Portugal, Serbia, Slovakia: data not available

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

PHARMACEUTICAL SALES

The world pharmaceutical market was worth an estimated € 614,583 million ($ 855,500 million) at ex-factory prices in 2011. The North American market (USA & Canada) remained the world's largest market with a 41.8% share, well ahead of Europe and Japan.

BREAKDOWN OF THE WORLD PHARMACEUTICAL MARKET – 2011 SALES

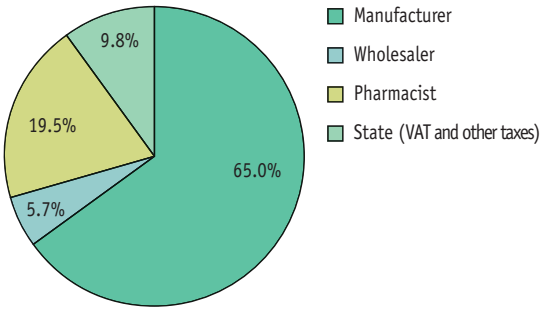


Note: Europe includes non-EU members and CIS markets
Source: IMS MIDAS, 2012 (data relate to the 2011 audited market at ex-factory prices)

PRICE STRUCTURE

Distribution margins, which are generally fixed by governments, and VAT rates differ significantly from country to country in Europe. On average, approximately 35% of the retail price of a medicine does not revert to the manufacturer but rather to distributors (pharmacists and wholesalers) and the State.

BREAKDOWN OF THE RETAIL PRICE OF A MEDICINE, 2010 (%)



Note: Non-weighted average for Europe (average estimate for 25 countries)
Source: EFPIA member associations

PHARMACEUTICAL MARKET VALUE (AT EX-FACTORY PRICES)

EFPIA 2010	€ million
Austria	3,022
Belgium	4,428
Bulgaria	671
Croatia	598
Cyprus	200
Czech Republic	1,976
Denmark	2,150
Estonia	192
Finland	2,005
France	27,334
Germany	27,022
Greece	5,047
Hungary	2,064
Iceland	104
Ireland	1,766
Italy	19,909
Latvia	276
Lithuania	479
Malta	77
Netherlands	4,686
Norway	1,485
Poland	5,016
Portugal	3,428
Romania	2,113
Serbia	607
Slovakia	1,092
Slovenia	519
Spain	14,858
Sweden	3,172
Switzerland	3,494
United Kingdom	13,583
Total	153,373

Note: Medicinal products as defined by Directive 2001/83/EEC
Cyprus, Denmark, Finland, Iceland, Latvia, Lithuania, Norway, Slovenia, Sweden: pharmaceutical market value at pharmacy purchasing prices
Malta: 2007 data
Greece: including parallel exports
Belgium, France, Germany, Ireland, Italy, Malta, Norway, Spain: estimate

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

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

VAT RATES APPLICABLE TO MEDICINES

The table below shows the VAT rates applied to medicines in European countries on 1 January 2012.

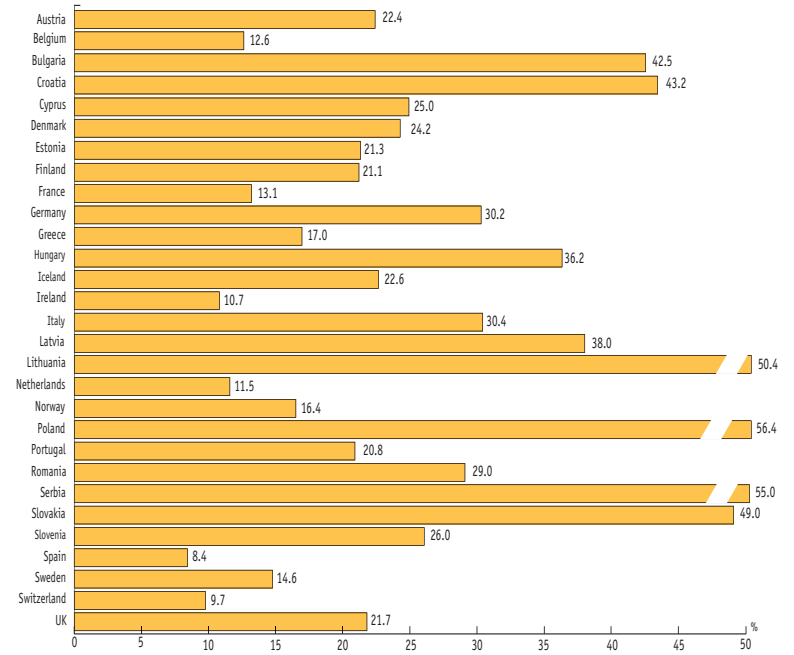
Country	Standard VAT rate (%)	VAT rates applied to medicines	
		Prescription (%)	OTC (%)
Austria	20.0	10.0	10.0
Belgium	21.0	6.0	6.0
Bulgaria	20.0	20.0	20.0
Croatia	23.0	0.0	23.0
Cyprus	15.0	5.0	5.0
Czech Republic	20.0	14.0	14.0
Denmark	25.0	25.0	25.0
Estonia	20.0	9.0	9.0
Finland	23.0	9.0	9.0
France (1)	19.6	2.1	7.0
Germany	19.0	19.0	19.0
Greece	23.0	6.5	6.5
Hungary	27.0	5.0	5.0
Iceland	25.5	25.5	25.5
Ireland (2)	23.0	0.0 - 23.0	0.0 – 23.0
Italy	20.0	10.0	10.0
Latvia	22.0	12.0	12.0
Lithuania (3)	21.0	5.0 – 21.0	5.0 – 21.0
Luxembourg	15.0	3.0	3.0
Malta	18.0	0.0	0.0
Netherlands	19.0	6.0	6.0
Norway	25.0	25.0	25.0
Poland	23.0	8.0	8.0
Portugal	23.0	6.0	6.0
Romania	24.0	9.0	9.0
Serbia	18.0	8.0	8.0
Slovakia	20.0	10.0	10.0
Slovenia	20.0	8.5	8.5
Spain	18.0	4.0	4.0
Sweden	25.0	0.0	25.0
Switzerland	8.0	2.5	2.5
United Kingdom	20.0	0.0	20.0

(1) France: reimbursable medicines 2.1%; non-reimbursable medicines 7.0%
(2) Ireland: oral medication 0%; other medication 23%
(3) Lithuania: reimbursable medicines 5.0%; non-reimbursable medicines 21.0%

GENERICS

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

SHARE (ESTIMATE - IN %) ACCOUNTED FOR BY GENERICS IN PHARMACEUTICAL MARKET SALES VALUE (AT EX-FACTORY PRICES), 2010



Note:

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

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

Iceland, Latvia, Lithuania, Netherlands, Norway, Romania, Serbia, Slovakia, Sweden, Switzerland: share of generics in total market sales

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

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

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

Source: EFPIA member associations

PHARMACEUTICAL EXPORTS

EFPIA 2010	€ million
Austria	6,158
Belgium	38,864
Bulgaria	450
Croatia	308
Cyprus	178
Czech Republic	1,257
Denmark	6,883
Estonia	47
Finland	996
France	26,304
Germany	49,832
Greece	1,014
Hungary	2,648
Ireland	24,156
Italy	13,291
Latvia	279
Lithuania	228
Luxembourg	119
Malta	214
Netherlands	11,990
Norway	543
Poland	1,684
Portugal	501
Romania	588
Slovakia	351
Slovenia	1,696
Spain	8,920
Sweden	6,934
Switzerland	43,959
United Kingdom	25,965
Total	**276,357**

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

Source: Eurostat (COMEXT database – February 2012)
Croatia: Business Monitor International; Norway: Statistics Norway;
Switzerland: Swiss Federal Trade Office

PHARMACEUTICAL IMPORTS

EFPIA 2010	€ million
Austria	5,499
Belgium	32,014
Bulgaria	698
Croatia	523
Cyprus	229
Czech Republic	2,851
Denmark	2,598
Estonia	243
Finland	1,672
France	21,538
Germany	35,989
Greece	3,555
Hungary	2,301
Ireland	3,463
Italy	16,396
Latvia	453
Lithuania	546
Luxembourg	400
Malta	94
Netherlands	10,496
Norway	1,408
Poland	4,477
Portugal	2,251
Romania	2,119
Slovakia	1,334
Slovenia	746
Spain	11,492
Sweden	3,089
Switzerland	18,258
United Kingdom	18,092
Total	**204,824**

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

Source: Eurostat (COMEXT database – February 2012)
Croatia: Business Monitor International; Norway: Statistics Norway;
Switzerland: Swiss Federal Trade Office

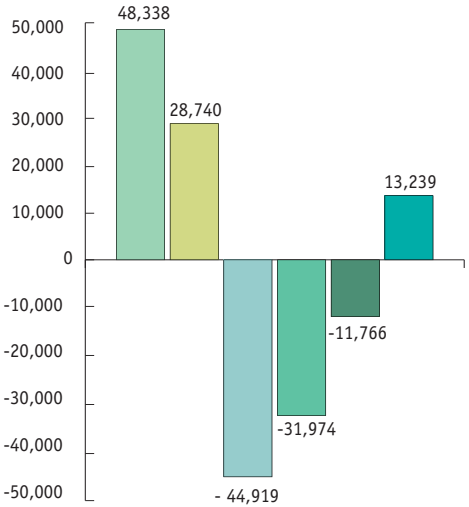
PHARMACEUTICAL TRADE BALANCE

EFPIA 2010	€ million
Austria	659
Belgium	6,850
Bulgaria	- 248
Croatia	- 215
Cyprus	- 51
Czech Republic	- 1,594
Denmark	4,285
Estonia	- 196
Finland	- 676
France	4,766
Germany	13,843
Greece	- 2,541
Hungary	347
Ireland	20,693
Italy	- 3,105
Latvia	- 174
Lithuania	- 318
Luxembourg	- 281
Malta	120
Netherlands	1,494
Norway	- 865
Poland	- 2,793
Portugal	- 1,750
Romania	- 1,531
Slovakia	- 983
Slovenia	950
Spain	- 2,572
Sweden	3,845
Switzerland	25,701
United Kingdom	7,873
Total	**71,533**

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

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

EU-27 TRADE BALANCE - HIGH TECHNOLOGY SECTORS (€ MILLION) - 2011

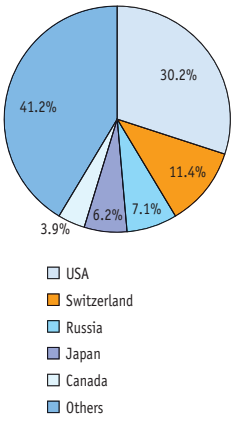


SITC 54 Pharmaceutical products
SITC 71 Power generating machinery and equipment
SITC 75 Office machines and computers
SITC 76 Telecommunication, sound, TV, video
SITC 77 Electrical machinery
SITC 87 Professional, scientific, controlling material

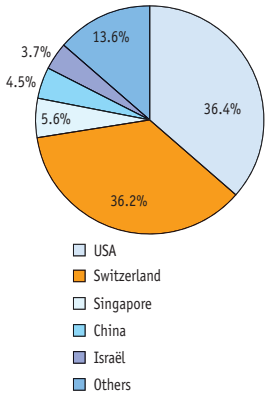
Source: Eurostat, COMEXT database, May 2012

THE EUROPEAN UNION'S TOP 5 PHARMACEUTICAL TRADING PARTNERS - 2011

EU exports



EU imports



Source: Eurostat, COMEXT database, May 2012

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

	1960	1970	1980	1990	2000	2009
Austria	4.3	5.2	7.4	8.3	9.9	11.0
Belgium	-	3.9	6.3	7.2	8.1	10.9
Czech Republic	-	-	-	4.7	6.5	8.2
Denmark	-	-	8.9	8.3	8.7	11.5
Estonia	-	-	-	-	5.3	7.0
Finland	3.8	5.5	6.3	7.7	7.2	9.2
France	3.8	5.4	7.0	8.4	10.1	11.8
Germany	-	6.0	8.4	8.3	10.3	11.6
Greece	-	5.4	5.9	6.6	7.9	9.6
Hungary	-	-	-	-	7.0	7.4
Iceland	3.0	4.7	6.3	7.8	9.5	9.7
Ireland	3.7	5.1	8.2	6.1	6.1	9.5
Italy	-	-	-	7.7	8.1	9.5
Luxembourg	-	3.1	5.2	5.4	7.5	7.8
Netherlands	-	-	7.4	8.0	8.0	12.0
Norway	2.9	4.4	7.0	7.6	8.4	9.6
Poland	-	-	-	4.8	5.5	7.4
Portugal	-	2.4	5.1	5.7	9.3	10.1
Slovakia	-	-	-	-	5.5	9.1
Slovenia	-	-	-	-	8.3	9.3
Spain	1.5	3.5	5.3	6.5	7.2	9.5
Sweden	-	6.8	8.9	8.2	8.2	10.0
Switzerland	4.9	5.5	7.4	8.2	10.2	11.4
Turkey	-	-	2.4	2.7	4.9	6.1
United Kingdom	3.9	4.5	5.6	5.9	7.0	9.8
Europe	**3.5**	**4.8**	**6.6**	**6.9**	**7.8**	**9.6**
USA	5.1	7.1	9.0	12.4	13.7	17.4
Japan	3.0	4.5	6.4	5.9	7.7	8.5

Note: Japan, Portugal, Turkey: 2008 data; Greece: 2007 data
Europe: non-weighted average (25 countries) – EFPIA calculations

Source: OECD Health Data 2011, November 2011

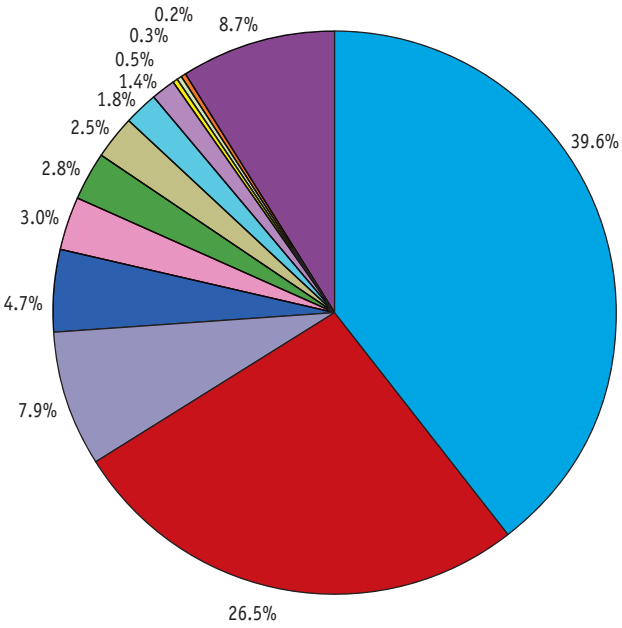
PAYMENT FOR PHARMACEUTICALS BY COMPULSORY HEALTH INSURANCE SYSTEMS AND NATIONAL HEALTH SERVICES (ambulatory care only)

EFPIA 2010	€ million
Austria	2,224
Belgium	3,528
Bulgaria	187
Croatia	387
Cyprus	90
Czech Republic	1,387
Denmark	948
Estonia	92
Finland	1,225
France	22,801
Germany	30,349
Greece	4,280
Hungary	1,338
Iceland	59
Ireland	1,725
Italy	11,105
Latvia	105
Lithuania	189
Malta	91
Netherlands	5,216
Norway	1,139
Poland	2,132
Portugal	1,640
Romania	1,023
Serbia	440
Slovakia	1,035
Slovenia	310
Spain	11,858
Sweden	1,968
Switzerland	3,466
United Kingdom	8,313
Total	**120,650**

Note: Czech Republic: 2009 data; Malta: 2007 data
France, Greece, Ireland, Netherlands, Norway, Sweden, United Kingdom: estimate

Source : EFPIA member associations (official figures)

CAUSES OF DEATH IN EUROPE (EU-27)

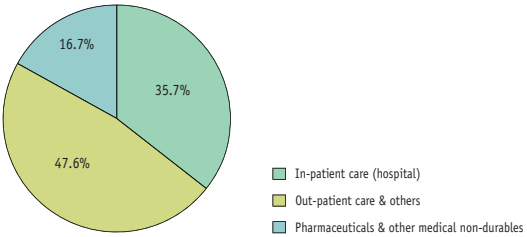


Data source: Eurostat, data relate to year 2009 (non-disease directly related causes of deaths: EFPIA calculations)

THE ADDED VALUE OF MEDICINES IN HEALTHCARE

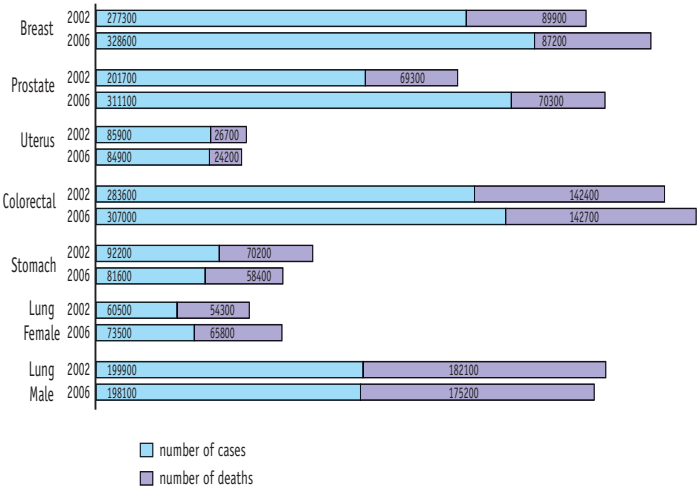
Medicines only constitute a small part of disease costs with, on average, 16.7% of total health expenditure in Europe being spent on pharmaceuticals and other medical non durables. In costly diseases such as cancer and rheumatoid arthritis, medicines account for even less than 10% of the total disease costs. Medicines can also generate additional savings, for example by substantially reducing costs in other branches of healthcare (hospital stays, invalidity, etc).

BREAKDOWN OF TOTAL HEALTH EXPENDITURE IN EUROPE – 2009



Source: OECD Health Data 2011 – EFPIA calculations (non-weighted average for 24 EU & EFTA countries)

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



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

EFPIA MEMBER ASSOCIATIONS

Austria
Fachverband der Chemischen Industrie Österreichs (FCIO)

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

France
Les Entreprises du Médicament (LEEM)

Greece
Hellenic Association of Pharmaceutical Companies (SFEE)

Italy
Associazione delle Imprese del Farmaco (Farmindustria)

Norway
Legemiddelindustriforeningen
Norwegian Association of Pharmaceutical Manufacturers (LMI)

Portugal
Associação Portuguesa da Indústria Farmacêutica (Apifarma)

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

Turkey
Arastirmaci Ilac Firmalari Dernegi (AIFD)

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

Finland
Lääketeollisuus ry
Pharma Industry Finland (PIF)

Germany
Verband Forschender Arzneimittelhersteller (VfA)

Ireland
Irish Pharmaceutical Healthcare Association (IPHA)

Netherlands
Vereniging Innovatieve Geneesmiddelen Nederland (Nefarma)

Poland
Employers Union of Innovative Pharmaceutical Companies (Infarma)

Spain
Asociación Nacional Empresarial de la Industria Farmacéutica (Farmaindustria)

Switzerland
Scienceindustries

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

ASSOCIATIONS WITH LIAISON STATUS

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

MEMBER COMPANIES

FULL MEMBERS

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

AFFILIATE MEMBERS

Bial	Portugal
Vifor Pharma	Switzerland

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

Founded in 1978, its members comprise 31 national pharmaceutical industry associations and 35 leading pharmaceutical companies undertaking research, development and manufacturing of medicinal products in Europe for human use.

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

Through its membership, EFPIA represents the common views of 1,900 large, medium and small companies including the entire European research-based pharmaceutical sector whose interests also include an important part of the generics segment. Two specialised groups have been created within EFPIA to address specific issues relating to vaccines (EVM – European Vaccine Manufacturers) and the needs of biopharmaceutical companies (EBE - European Biopharmaceutical Enterprises).

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

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