# Market Analysis of European Pharmaceutical Market MAT 2020(Q3)-MAT 2022(Q3)

Synopsis Submitted to

**The IIHMR University, Jaipur**

for the partial fulfilment for the award of the

degree of Master of Business Administration

MBA - Pharmaceutical Management

by

Anshu Aman

Under the Supervision and Guidance of

Dr. Sudhinder Singh Chowhan

Associate Professor – School of Pharmaceutical Management

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## DECLARATION BY STUDENT

I hereby declare that this dissertation titled '**Market Analysis of European Pharmaceutical Market MAT 2020 (Q3)-MAT 2022 (Q3)'** is the bonafide record of my original researchwork. I declare that it has not been submitted to any other university or institution for the award of any degree or diploma. Information derived from the published or unpublished workof others has been duly acknowledged in the text.

(Signature)

Name of Student: Anshu Aman

Date: 5th June 2023

# Blue Berry Pharma Advisory

30th May 2023

**CERTIFICATE**

This is to certify that dissertation titled **'Market Analysis of European Pharmaceutical Market MAT 2020 (Q3)-MAT 2022 (Q3)'** is a record of the research work undertaken by Mr. Anshu Aman in partial fulfillment of the requirements for the award of degree of MBA Pharmaceutical Management from the IIHMR University, Jaipur under my guidance and supervision and his/her approach to the research study has been sincere, scientific, and analytical.

**Subhash Seth**

Founder & CEO

Blue Berry Pharma Advisory

## ACKNOWLEDGEMENT

This dissertation was a great learning experience and became a reality with the kind support and help that I have received. I would like to extend my thanks to all of them**.**

Foremost, I would like to express my gratitude to IIHMR University for providing us with the opportunity to conduct the dissertation. I would like to thank Mr. Subhash Seth, Founder and CEO, Blue Berry Pharma Advisory for his much-needed support and guidance to complete this project.

I am extremely thankful to Dr. Saurabh Kumar Banerjee, Dean, Department of Pharmaceutical Management for his suggestion and supervision.

I would like to express my gratitude to my mentor Dr. Sudhinder Singh Chauhan for imparting his knowledge and expertise in this study. His thorough guidance and dedication have helped me in accomplishing this task.

Lastly, I would like to thank my parents and my friends who have given me moral support throughout my entire time of the study.

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# Abstract

This report presents a comprehensive market analysis of the European pharmaceutical market (of 33 countries) for the period of MAT 2020(Q3)-MAT 2022(Q3). The report includes an overview of the market, key trends, market segmentation and competitive landscape. The analysis considers factors such as revenue, market share, growth rate, and key players to understand the market's current state and prospects. The research utilizes secondary data sources and a mixed-method approach to analyze the data.

The study finds that the European pharmaceutical market has witnessed steady growth over the past two years, driven by the increasing demand for biosimilars, the aging population, and the rising prevalence of chronic diseases. The report also identifies opportunities and challenges for pharmaceutical companies operating in the region and provides recommendations to capitalize on the market growth.



Key words: market analysis; european pharmaceutical market; pharmaceutical industry; biosimilar; european union;

# 1. INTRODUCTION

One of the most important economic sectors out there is the pharmaceutical industry, and Europe's own pharmaceutical market is no exception. The sector has made significant gains through its inclusion in the global marketplace by contributing substantially to it as well. In order to identify areas with room for growth as well as challenges on which we need to focus our efforts, let us take stock of this dynamic landscape carefully.
Through examining MAT 2020(Q3) through MAT 2022(Q3), we endeavor today toward these goals. Today we seek nothing less than profound knowledge about Europe's vast pharmaceutical landscape; a landscape bouncing back via multiple channels such as an increasingly common usage rate for orphan drugs or how biosimilars are gaining traction rapidly now.
As far-reaching impacts like these continue taking root in our ever-shifting society around us altogether impacting things like affordability or accessibility related problems when seeking care arise as hindrances for pursuing treatment options meant improving patient outcomes-often desired by hospitals or private practices operating inside this space-We'll chart paths forward toward positive outcomes whenever possible.

## IQVIA MIDAS Europe- 2022 (Q3):

IQVIA MIDAS is an essential industry tool entrusted by pharma professionals when it comes to drug sales and utilization within the intricate European pharmaceutical marketplace. The database includes data for over 80,000 products being marketed in thirty three countries of Europe, viz., Austria, Belarus, Bosnia and Herzegovina, Belgium, Bulgaria, Croatia, Czech Republic, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia Spain, Sweden, Kazakhstan, Russia, Serbia, Switzerland, Turkey and United Kingdom.

## Market Size:

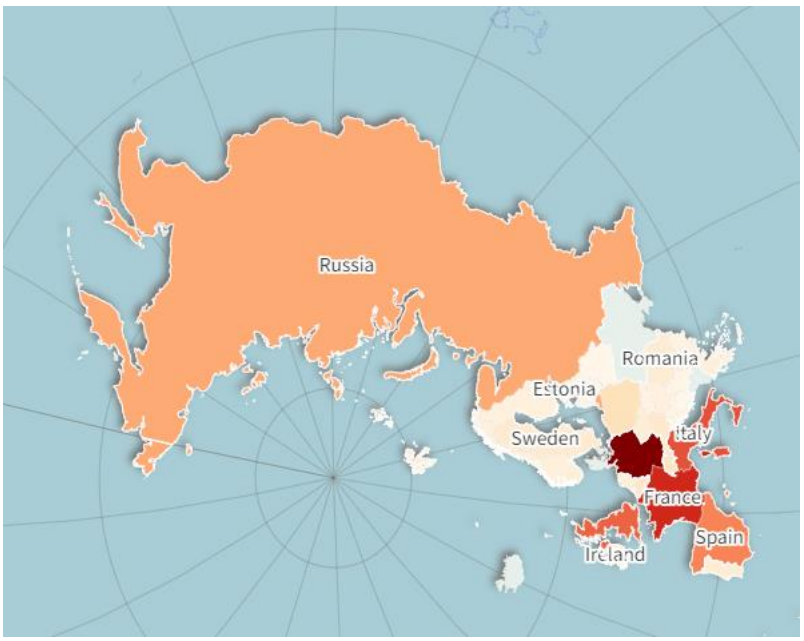



*Figure 1: Pharmaceutical Market size of different countries of Europe. (As on MAT 2022 Q3)*

**Market Segmentation:**

The market is segmented by ATC/Therapeutic Class (Alimentary Tract and Metabolism, Blood and Blood Forming Organs, Cardiovascular System, Dermatologicals Drugs, Genitourinary System and Reproductive Hormones, Systemic Hormonal Preparations, excluding Reproductive Hormones and Insulin, Anti-infectives for Systemic Use, Antineoplastic and Immunomodulating Agents, Musculoskeletal System, Nervous System, Antiparasitic Products, Insecticides, and Repellents, Respiratory System, Sensory Organs, and Various ATC Structures), Sector (Retail Sector, and Hospital Sector), Prescription Type (Prescription Drugs and Non-prescription Drugs), Biologic Molecule (Biologic and Non-Biologic), Generic Product classification (Biosimilar products, Generic Products, Non Generic Products, Early Entry Generic Products, Non Categorized Products and Other Products) and NFC Classification (Up to 3 level).

**Countries:**

This report includes market analysis of the following countries of Europe:

| | Country | EMA Member |
|---|---|---|
| 1. | Austria | Yes |
| 2. | Belarus | No |
| 3. | Belgium | Yes |
| 4. | Bosnia and Herzegovina | No |
| 5. | Bulgaria | Yes |
| 6. | Croatia | Yes |
| 7. | Czech Republic | Yes |
| 8. | Estonia | Yes |
| 9. | Finland | Yes |
| 10. | France | Yes |
| 11. | Germany | Yes |
| 12. | Greece | Yes |
| 13. | Hungary | Yes |
| 14. | Ireland | Yes |
| 15. | Italy | Yes |
| 16. | Kazakhstan | No |
| 17. | Latvia | Yes |
| 18. | Lithuania | Yes |
| 19. | Luxembourg | Yes |
| 20. | Netherlands | Yes |
| 21. | Norway | Yes |
| 22. | Poland | Yes |
| 23. | Portugal | Yes |
| 24. | Romania | Yes |
| 25. | Russia | No |
| 26. | Serbia | No |
| 27. | Slovakia | Yes |
| 28. | Slovenia | Yes |
| 29. | Spain | Yes |
| 30. | Sweden | Yes |
| 31. | Switzerland | No |
| 32. | Turkey | No |
| 33. | United Kingdom | No |

*Table 1: List of EMA Countries*

**Types of Pharmaceutical market in Europe:**

The biosimilar market is the fastest expanding category, with a YoY growth rate of 22% from 2020 to 2021 and a three-year AAGR of 19%. This sector likewise has the largest market share, accounting for 10% of the total.

The non-generic market has the greatest revenue in the Biologics industry, accounting for 76% of total revenue, although it is growing at a slower rate than the biosimilar and other categories.

The generic market has the slowest growth rate and the smallest market share at 2%, but it nevertheless contributes significantly to the Biologics industry's overall revenue.

The other sector, which includes branded biologics, has a 12% market share and has grown consistently at a CAGR of 6% over the last three years.

## 2. LITERATURE REVIEW

A report released by IQVIA indicates that in 2019, Europe's pharmaceutical market was worth $228 billion which is an increase by 3.8% from previous years. Predictions suggest significant growth within this sector with expected compound annual growth rates (CAGR) averaging between 3-6% up until approximately 2025.

It appears that cancer drugs comprised all ten leading non-generic medications prominently featured in Europe during Q3 of 2022; most likely representing greater occurrences coupled with proven effective treatments options.

**EphMRA Anatomical Classification Guidelines 2022:**

For overall uniformity throughout this vast industry, EphMRA instituted The Anatomical Classification of Pharmaceutical Products system - enabling use of five-digit ATC codes for determining medicinal categories under therapeutic class chemical sub-class and pharmacological action descriptions.

The EphMRA Anatomical Classification Guidelines 2022 are revised on an annual basis to reflect developments in the pharmaceutical industry. EPHMRA categorises items mostly based on their indications and uses. The major goal of EPHMRA Classification is to meet the marketing requirements of pharmaceutical businesses.

The categorization system is divided into levels, each of which represents a distinct level of anatomical detail. There are key anatomical categories at the highest level, such as "Central Nervous System," "Cardiovascular System," "Respiratory System," and "Digestive System." These primary categories are further subdivided into more narrow subcategories, allowing for more detailed product classification.

The guidelines also include a therapeutic categorization component, which aids in further refining the classification by concentrating on the product's medicinal purpose allowing better analysis and product comparison within specific therapeutic areas.

Furthermore, the EphMRA ATC rules provide a chemical/therapeutic subgroup categorization, allowing for even more specificity when categorising items based on their chemical makeup or unique therapeutic qualities.

**EphMRA New Form Codes Guidelines 2022:**

The New Form Code Classification Guidelines offer a uniform classification system for pharmaceutical products based on their dosage form. These guidelines are established by the European Pharmaceutical Marketing Research Association (EPHMRA) and are utilized by pharmaceutical companies, healthcare professionals, and regulators to categorize and monitor medications.

The current edition of the New Form Code Classification Guidelines contains following sections:

- Section 1: Introduction
- Section 2: Classification of Dosage Forms
- Section 3: List of New Form Codes

Section 1 presents an overview of the rules and explains the New Form Code's objective.

Section 2 describes the categorization system in detail, including the many types of dosage forms and the criteria for issuing a New Form Code.

Section 3 contains a list of all of the New Form Codes that are currently in use.

## 3. RESEARCH OBJECTIVE

This report of pharmaceutical market analysis of European market has one clear goal: to understand entirety the European Pharmaceutical Market between MAT 2020(Q3) & MAT 2022(Q3).

*The study's major objectives are outlined below.*

- Analyzing growth trends throughout every aspect of industry

- Gauging the impact of COVID 19

- Providing detailed insight into all therapeutic segments

- Scoping out leaders amongst brands occupying their respective spaces

- Investigating how Biosimilars are fairing at present

- comprehending Key Players who are contributing significantly

- comprehending Regulatory landscapes relevant to our purpose

- Illuminating any clear challenges or evident opportunities.

## 4. RESEARCH METHODOLOGY

**Method:**

Secondary data sources used in this study include market reports, scholarly journals, and government publications. The data was analyzed using quantitative and qualitative methods. Quantitative data analysis includes statistical methods.

Qualitative data analysis involves content analysis to identify key trends and patterns in the data. Key steps involved in the process are listed below:

- Data Procurement: This step involved procurement of Market data or related information via different sources like Premium databases, Websites, Open Access Journals, Academic Articles, Market Reports. The secondary research data was provided by IQVIA- MIDAS.
- Information Analysis:

**Data Collection Instrument:** Information was collected through databases found online and market research database by IQVIA. The study is based on online journals, articles, databases etc.

**Data Collection Method:** The data collected is secondary in nature.

Secondary data was collected through books, journals, articles, websites etc. In addition, an extensive literature review survey was also undertaken.

**Data Collection and Analysis:** The responses collected were organized in the form of an excel sheet and statistically analyzed using the statistical formulae. The results were then suitably presentedin the report.

Since the dataset was huge, so to calculate revenue range, the skewed data was converted into normal distribution by taking the logarithmic value of revenue of all the products. Then the standard deviation was calculated and using Z-Score , the range was calculated.

Similar step was repeated to calculate the range for growth rate and then a matrix was created.

| REVENUE | | GROWTH RATE | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | | A+ | A | B+ | B | C+ | C |
| | High | A+ | A+A+ | A+A | A+B+ | A+B | A+C+ | A+C |
| | | A | AA+ | AA | AB+ | AB | AC+ | AC |
| | Medium | B+ | B+A+ | B+A | B+B+ | B+B | B+C+ | B+C |
| | | B | BA+ | BA | BB+ | BB | BC+ | BC |
| | Low | C+ | C+A+ | C+A | C+B+ | C+B | C+C+ | C+C |
| | | C | CA+ | CA | CB+ | CB | CC+ | CC |

Fig 2. Revenue and Growth rate matrix

The meaning of ranges is mentioned in Table 2.

| Category | Min | | Max | |
|---|---|---|---|---|
| C | € | 0.5 | € | 1,000 |
| C+ | € | 1,000 | € | 9,999 |
| B | € | 10,003 | € | 149,986 |
| B+ | € | 150,000 | € | 999,962 |
| A | € | 1,000,196 | € | 99,181,393 |
| A+ | € | 101,037,483 | € | 1,062,559,598 |

| Growth Rate | | |
|---|---|---|
| | -9646675% | 0% |
| C | 0% | 2% |
| C+ | 2% | 14% |
| B | 14% | 104% |
| B+ | 104% | 767% |
| A | 767% | 5558% |
| A+ | 5560% | 865245218% |

**Table 2. Revenue and Growth rate matrix**

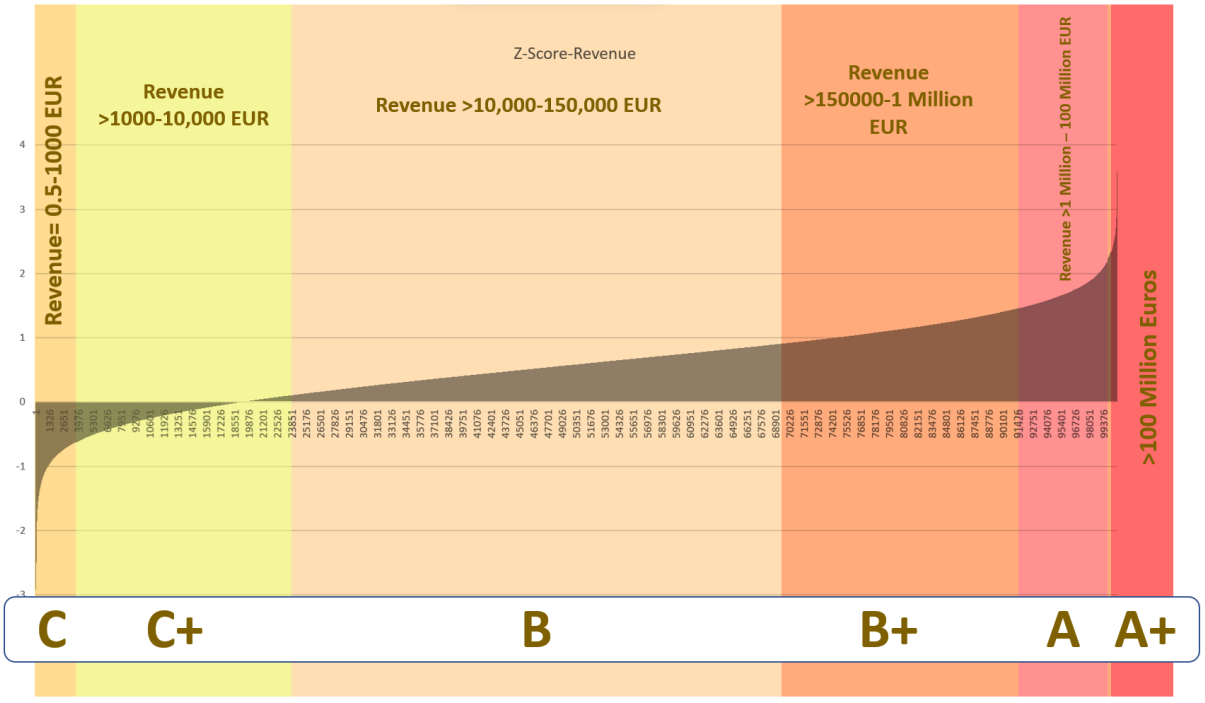



**Fig. 3: Z-Score Curve for Average Revenue.**

## 5. DATA ANALYSIS AND INTERPRETATION

**Period:** MAT 2020 Q3 - MAT 2022 Q3

**Data Source:** IQVIA MIDAS-Europe (Sept. 2022)

The entire pharmaceutical market revenue in 2022 Q3 was €282.8 billion, a considerable rise from the revenue in 2021 Q3 (€253.9 billion) and 2020 Q3 (€241.1 billion). Similarly, total units sold in the third quarter of 2022 (386 crores) were greater than in the third quarters of 2021 (368 crores) and 2020 (381 crores).

A significant decrease in unit sales in 2021 from the previous year shows a decreased sale of pharmaceutical products during the COVID pandemic; yet, product prices must have grown during the COVID pandemic, therefore income produced in 2021 was greater than in 2020.

### SEGMENTATION BY SECTOR:

**Retail Market in Europe**:

The European pharmaceutical retail market is increasing at a slower rate than the global pharmaceutical market. In 2022 Q3, the retail sector of the European Pharmaceutical Market was valued at €173 billion, accounting for about 61% of the market's total revenue.

Although the retail industry is expanding, as seen by revenue increasing from €153 billion in 2020 Q3 to €157 billion in 2021 Q3 and eventually to €173 billion in 2022 Q3, its market share is dropping.

The retail sector had a market share of 63% in 2020 Q3, which fell to 62% in 2021 Q3 and 61% in 2022 Q3.

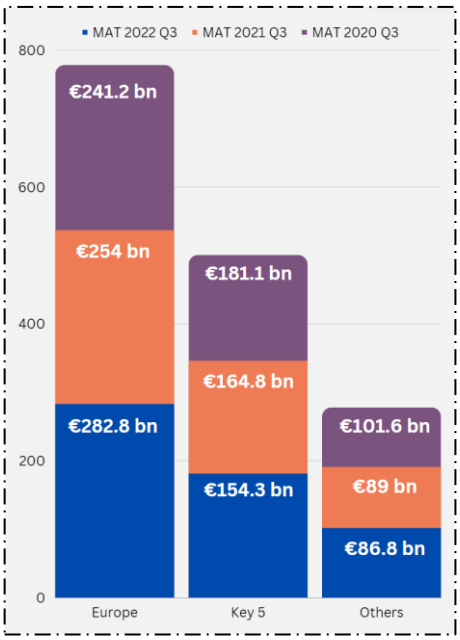
The retail sector's revenue in MAT 2022 (Q3) amounted for 36.3% of the overall market among the Top 5 countries, namely Germany, France, Italy, the United Kingdom, and Spain.

**Hospital Sector in Europe:**

The hospital sector is becoming a more important role in the European pharmaceu tical industry.

According to research conducted during Q3 of 2022, data shows that the European Pharmaceutical Market's hospital sector had an estimated value of approximately €110 billion, accounting for approximately 39% of its overall sales.

When compared to its figures from Q3 in 2020 where it held around a third proportion (37%) with just €88 billion worth of sales; there is apparent progress shown as figures grew over time - compromising about a total market share percentage gain by almost one percent (38%) - leading up to this year's third quarter where it reached at least €97 billion worth. As for statistics on pharma industry growth as part of Europe's standard operations over time from MATs: There has been quite an impressive leap forward as well wherein between MATs (from Q3 in '20 until now), there is an added influx amounting close to or exceeding around €42 billion because evidently speaking;



it had mostly come from hospitals making their services even more valuable at such times - about nearly half or more (€22b) being incremental changes due solely towards this particular healthcare provider alone.

**SEGMENTATION BY THERAPEUTIC CATEGORIES:**

1. **Alimentary Tract and Metabolism:**
    - MAT 2022 Q3 revenue: €32.6 bn
    - YoY growth rate: 11.97%
    - MS 2022: 11.53%
    - Total count of products: 12,917
    - Count of non-generic products: 863
    - Count of generic products: 3,198
    - Count of biosimilar products: 12
2. **Blood and Blood Forming Organs:**
    - MAT 2022 Q3 revenue: €23.6 bn.
    - YoY growth rate: 8.92%
    - MS 2022: 8.24%
    - Total count of products: 2,120
    - Count of non-generic products: 235
    - Count of generic products: 966
    - Count of biosimilar products: 23
3. **Cardiovascular System:**
    - MAT 2022 Q3 revenue: €21.4 bn.
    - YoY growth rate: 8.73%
    - MS 2022: 7.58%
    - Total count of products: 9,303
    - Count of non-generic products: 1,180
    - Count of generic products: 6,618
    - Count of biosimilar products: 0
4. **Dermatology:**
    - MAT 2022 Q3 revenue: €6.45 bn.
    - YoY growth rate: 13.78%
    - MS 2022: 2.28%
    - Total count of products: 6,814
    - Count of non-generic products: 976
    - Count of generic products: 1,861
    - Count of biosimilar products: 1
5. **Genito-Urinary and Sex Hormones:**
    - MAT 2022 Q3 revenue: €7.57 bn.
    - YoY growth rate: 8.05%
    - MS 2022: 2.78%
    - Total count of products: 4,786
    - Count of non-generic products: 628
    - Count of generic products: 2,702
    - Count of biosimilar products: 3
6. **Respiratory System:**
    - MAT 2022 Q3 revenue: €21.5 bn.
    - YoY growth rate: 26.67%
    - MS 2022: 7.15%
    - Total count of products: 6,352
    - Count of non-generic products: 950

- Count of generic products: 3,040
- Count of biosimilar products: 0

**7. Hospital Solutions:**

- MAT 2022 Q3 revenue: €3.35 bn.
- YoY growth rate: 2.18%
- MS 2022: 1.13%
- Total count of products: 1,633
- Count of non-generic products: 6
- Count of generic products: 4
- Count of biosimilar products: 0

**8. Antineoplastic and Immunomodulating Agents:**

- MAT 2022 Q3 revenue: €74.5 bn.
- YoY growth rate: 13.18%
- MS 2022: 26.54%
- Total count of products: 3,082
- Count of non-generic products: 513
- Count of generic products: 2,351
- Count of biosimilar products: 59

**9. Nervous System:**

- MAT 2022 Q3 revenue: €36.3 bn.
- YoY growth rate: 5.53%
- MS 2022: 12.82%
- Total count of products: 10,729
- Count of non-generic products: 1,299
- Count of generic products: 8,240
- Count of biosimilar products: 0

**10. Musculo-skeletal System:**

- MAT 2022 Q3 revenue: €9.4 bn.
- YoY growth rate: 9.81%
- MS 2022: 3.35%
- Total count of products: 4,623
- Count of non-generic products: 592
- Count of generic products: 2,543
- Count of biosimilar products: 0

**11. Various:**

- MAT 2022 Q3 revenue: €2.5 bn.
- YoY growth rate: 0.16%
- MS 2022: 0.84%
- Total count of products: 9,698
- Count of non-generic products: 423
- Count of generic products: 361
- Count of biosimilar products: 0

**12. Parasitology:**

- MAT 2022 Q3 revenue: €0.3 bn.
- YoY growth rate: 16.80%
- MS 2022: 0.10%
- Total count of products: 397

- Count of non-generic products: 90
- Count of generic products: 149
- Count of biosimilar products: 0

**13. Sensory Organs:**

- MAT 2022 Q3 revenue: €7.6 bn.
- YoY growth rate: 9.56%
- MS 2022: 2.69%
- Total count of products: 3,063
- Count of non-generic products: 636
- Count of generic products: 1,758
- Count of biosimilar products: 1

**14. Anti-infective Systemic:**

- MAT 2022 Q3 revenue: €27.3 bn
- YoY growth rate: 12.94%
- MS 2022: 9.68%
- Total count of products: 6,387
- Count of non-generic products: 625
- Count of generic products: 5,152
- Count of biosimilar products: 0

**15. Systemic Hormonal Preparations (Excluding Sex Hormones):**

- MAT 2022 Q3 revenue: €4.28 bn
- YoY growth rate: 3.17%
- MS 2022: 1.43%
- Total count of products: 1,190
- Count of non-generic products: 159
- Count of generic products: 922
- Count of biosimilar products: 5

**16. Diagnostics:**

- MAT 2022 Q3 revenue: €4 bn
- YoY growth rate: 11.38%
- MS 2022: 1.34%
- Total count of products: 2,383
- Count of non-generic products: 5
- Count of generic products: 4
- Count of biosimilar products: 0

**MARKET ANALYSIS REPORT FOR ANTINEOPLASTIC DRUGS IN EUROPE**

The market for antineoplastic drugs is expanding rapidly in Europe. The market is expected to grow more in the future years as a result of Europe's ageing population and the introduction of new and more effective cancer medications.

**Period:** MAT 2020 Q3 - MAT 2022 Q3

**Data Source:** IQVIA MIDAS-Europe (Sept. 2022), EphMRA ATC Classification 2022, GLOBOCAN: Global Cancer Statistics

**MARKET OVERVIEW:**

Antineoplastic and immunomodulating drugs are currently the most lucrative category of therapy. Generating a staggering €75 billion in sales with an annual growth rate of 12%. This points towards a significant demand for treatments for cancer and immune disorders. However, despite their impressive financial success these agents only sold 0.6 billion units which suggest that such treatments may be costly when compared to other therapeutic groups.

According to the article "Global Cancer Statistics 2020: GLOBOCAN Estimates of Incidence and Mortality Worldwide for 36 Cancers in 185 Countries. " it is expected that Europe will see around 4.1 million new cancer cases and approximately 1.9 million cancer related deaths in the year ahead. Further statistics reveal an age standardized incidence rate of approximately 287.2 per every 100,000 individuals and a death rate of roughly 126.7 per every 100,000 individuals across Europe alone--a higher incidence than many other countries in the world experience.

Breast cancer, lung cancer and colorectal cancer appear as the most common cancers within Europe today.

**SEGMENTATION:**

By therapeutic class, the market is segmented into:

1. L1: Antineoplastics:
    - L1A Alkylating agents
    - L1B Antimetabolites
    - L1C Plant-Based Antineoplastics
    - L1D Antineoplastic Antibiotics
    - L1F Platinum Antineoplastics
    - L1G Monoclonal Antibody Antineoplastics
    - L1H Protein Kinase Inhibitor Antineoplastics
    - L1J Proteasome Inhibitor Antineoplastics
    - L1X All Other Antineoplastics
    - L1K Lidomide Antineoplastics
    - L1L PARP Inhibitor Antineoplastics
2. L2: Cytostatic Hormone Therapy:
    - L2A Cytostatic Hormones
    - L2B Cytostatic Hormone Antagonists
3. L3: Immunostimulating agents
    - L3A Immunostimulating Agents Excluding Interferons
    - L3B Interferons
4. L4: Immunosuppresants
    - L4B Anti-Tnf Products
    - L4C Interleukin Inhibitors
    - L4X Other Immunosuppresants

| L: Antinoplastic and immunomodulating agents | | Growth Rate | | | | Market Share | | | | Product Count | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Therapeutic Category | | YoY GR1 | YoY GR2 | AAGR | CAGR | MS 2022 | MS 2021 | MS 2020 | Average MS | Total Count of Products | Count of Non-Generic Products | Count of Generic Products | Count of Biosimilar Products | Other Category Products |
| **L1** | **Antineoplastics** | **14%** | **13%** | **14%** | **9%** | **64%** | **64%** | **63%** | **64%** | **1929** | **343** | **1455** | **25** | **106** |
| L1A | Alkylating agents | -3% | -3% | -3% | -2% | 1% | 1% | 1% | 1% | 224 | 37 | 187 | 0 | 0 |
| L1B | Antimetabolites | -8% | -7% | -7% | -5% | 2% | 2% | 3% | 2% | 387 | 42 | 340 | 0 | 5 |
| L1C | Plant-Based Antineoplastics | -5% | -5% | -5% | -3% | 2% | 2% | 2% | 2% | 285 | 22 | 260 | 0 | 3 |
| L1D | Antineoplastic Antibiotics | -6% | -2% | -4% | -3% | 0% | 0% | 0% | 0% | 184 | 27 | 156 | 0 | 1 |
| L1F | Platinum Antineoplastics | 2% | -6% | -2% | -1% | 0% | 1% | 1% | 1% | 113 | 4 | 109 | 0 | 0 |
| L1G | Monoclonal Antibody Antineoplastics | 23% | 17% | 20% | 13% | 32% | 29% | 28% | 29% | 90 | 56 | 9 | 25 | 0 |
| L1H | Protein Kinase Inhibitor Antineoplastics | 11% | 11% | 11% | 7% | 18% | 18% | 18% | 18% | 350 | 75 | 256 | 0 | 19 |
| L1J | Proteasome Inhibitor Antineoplastics | 6% | -3% | 2% | 1% | 1% | 1% | 1% | 1% | 60 | 3 | 57 | 0 | 0 |
| L1X | All Other Antineoplastics | 30% | 28% | 29% | 19% | 3% | 2% | 2% | 2% | 166 | 63 | 31 | 0 | 72 |
| L1K | Lidomide Antineoplastics | -12% | 14% | 1% | 0% | 4% | 6% | 5% | 5% | 64 | 9 | 50 | 0 | 5 |
| L1L | PARP Inhibitor Antineoplastics | 30% | 44% | 37% | 23% | 2% | 1% | 1% | 1% | 6 | 5 | 0 | 0 | 1 |
| **L2** | **Cytostatic Hormone Therapy** | **16%** | **10%** | **13%** | **9%** | **8%** | **8%** | **8%** | **8%** | **708** | **42** | **657** | **0** | **9** |
| L2A | Cytostatic Hormones | 6% | 0% | 3% | 2% | 1% | 2% | 2% | 2% | 81 | 15 | 63 | 0 | 3 |
| L2B | Cytostatic Hormone Antagonists | 19% | 13% | 16% | 10% | 7% | 7% | 6% | 7% | 627 | 27 | 594 | 0 | 6 |
| **L3** | **Immunostimulating agents** | **5%** | **0%** | **3%** | **2%** | **2%** | **2%** | **3%** | **2%** | **162** | **79** | **38** | **17** | **28** |
| L3A | Immunostimulating Agents Excluding Interferons | 1% | 0% | 1% | 0% | 2% | 2% | 2% | 2% | 125 | 50 | 30 | 17 | 28 |
| L3B | Interferons | 26% | 4% | 15% | 9% | 0% | 0% | 0% | 0% | 37 | 29 | 8 | 0 | 0 |
| **L4** | **Immunosuppresants** | **11%** | **9%** | **10%** | **6%** | **25%** | **26%** | **26%** | **26%** | **283** | **49** | **201** | **17** | **16** |
| L4B | Anti-Tnf Products | 2% | 1% | 2% | 1% | 12% | 13% | 14% | 13% | 35 | 12 | 5 | 17 | 1 |
| L4C | Interleukin Inhibitors | 26% | 27% | 26% | 17% | 7% | 7% | 6% | 7% | 9 | 9 | 0 | 0 | 0 |
| L4X | Other Immunosuppresants | 13% | 8% | 11% | 7% | 6% | 6% | 6% | 6% | 239 | 28 | 196 | 0 | 15 |
| **TOTAL ONCOLOGY** | | **13%** | **11%** | **12%** | **8%** | **100%** | **100%** | **100%** | **100%** | **3082** | **513** | **2351** | **59** | **159** |

*Table 3: Market of Antineoplastic and Immunomodulating agents in Europe.*

## Market Analysis Report for Antineoplastic Market in Europe

The following study analyses the European Antineoplastic market, concentrating on key products, market trends, growth rate, and competitive landscape. The Antineoplastic market constitute to 64% of the total market. The report is built using the provided data table 3.

### Executive Summary:

The Antineoplastic market in Europe is witnessing a rapid growth due to factors such as europe's ageing population and the development of new and more effective cancer therapies.. The market is showing a rapid growth. Key trends include the

### Market Overview:

Antineoplastic refer to pharmaceutical products and therapies used for the prevention and treatment of multiple types of Cancer. These Includes all preparations primarily prescribed for the treatment of malignancies, as well as all packs particularly designed for use in anticancer therapy, such as special anticancer antibiotic packs.

### Market Size and Growth:

The Antineoplastic market in Europe has experienced rapid growth in recent years. As per the data table, the total market size for Antineoplastic in Europe reached 47943 million euros in the MAT 2022 Q3 period. The market is expected to witness further growth.

### Market Segmentation:

Product Segmentation:

Based on the data tables provided, the Antineoplastic market in Europe can be segmented into various product categories, including:

- Alkylating agents
- Antimetabolites

- Plant-Based Antineoplastics
- Antineoplastic Antibiotics
- Platinum Antineoplastics
- Monoclonal Antibody Antineoplastics
- Protein Kinase Inhibitor Antineoplastics
- Proteasome Inhibitor Antineoplastics
- All Other Antineoplastics
- Lidomide Antineoplastics
- PARP Inhibitor Antineoplastics

Geographic Segmentation:

The European Antineoplastic market is further subdivided into geographical areas, which include EMA nations, non-EMA countries, the Key 5 countries, and the rest of Europe. Market dynamics, regulatory frameworks, and consumer preferences may differ by area.

**Competitive Landscape:**

The Antineoplastic market in Europe is highly competetive, with 1929 products and 475 corporations across europe, with several multinational and local players. Key players operating in the market are, Bristol Mayer's Squibb., Merck & Co., Roche, and many others. These companies compete on factors such as product innovation, brand reputation, pricing, and distribution channels. Strategic partnerships, mergers, and acquisitions are common strategies employed to gain a competitive edge in the market.

**Market Trends:**

Following are the market trend for Antineoplastic market.

1. Increasing Demand for Monoclonal Antibody Antineoplastics Products: There is a growing demand for Monoclonal Antibody Antineoplastics because of rise in targeted cancer therapy. Companies that offer a diverse range of specialized products are likely to gain a competitive advantage. The year over year growth rate of Monoclonal Antibody Antineoplastics is 23% and CAGR of 13%.

2. Rising demand of cancer therapy.

3. Increasing biosimilars acceptance.

**Market Challenges:**

Regulatory policies

The Antineoplastic market in Europe is subject to stringent regulatory requirements, including product registrations, safety assessments, and compliance with quality standards. Companies must invest in research and development, testing, and regulatory affairs to meet these requirements.

Rising Biosimilars

As many of the branded drugs are loosing patent, the alternative therapies are covering the market for them. Biosimilars are an example of this. Most of the biosimilars in Europe, belongs to Antineoplastic category.

**Market Opportunities:**

Rising Prevalance of Cancer

The increasing aging population in Europe presents an opportunity for the Antineoplastic market.

Inclanation towards targeted therapies

# Market Analysis Report for Cytostatic Hormone Therapy Market in Europe

The following study analyses the European Cytostatic Hormone Therapy market, concentrating on key products, market trends, growth rate, and competitive landscape. The Cytostatic Hormone Therapy market constitute to 8% of the total market. The report is built using the provided data table 3.

## Executive Summary:

The Cytostatic Hormone Therapy market in Europe is witnessing a steady growth due to factors such as europe's ageing population, the development of new and more effective cancer therapies and increasing acceptance for targeted therapies. The market is showing a steady growth. Key trends include the

## Market Overview:

Cytostatic Hormone Therapy refer to pharmaceutical products and therapies used for the prevention and treatment of multiple types of Cancer. These Includes Adrenocorticoids, progestogens, oestrogens, anti-oestrogens, and androgens

## Market Size and Growth:

The Cytostatic Hormone Therapy market in Europe has experienced steady growth in recent years. As per the data table, the total market size for Cytostatic Hormone Therapy in Europe reached 6198 million euros in the MAT 2022 Q3 period. The market is expected to witness further growth.

## Market Segmentation:

Product Segmentation:

Based on the data tables provided, the Cytostatic Hormone Therapy market in Europe can be segmented into various product categories, including:

- Cytostatic Hormones
- Cytostatic Hormone Antagonists

Geographic Segmentation:

The European Cytostatic Hormone Therapy market is further subdivided into geographical areas, which include EMA nations, non-EMA countries, the Key 5 countries, and the rest of Europe. Market dynamics, regulatory frameworks, and consumer preferences may differ by area.

## Competitive Landscape:

The Cytostatic Hormone Therapy market in Europe is competetive, with 708 products and 280 corporations, with several multinational and local players. Key players operating in the market are, Astella Pharma, Jhonson & Johnson, Ipsen, and many others. These companies compete on factors such as product innovation, brand reputation, pricing, and distribution channels. Strategic partnerships, mergers, and acquisitions are common strategies employed to gain a competitive edge in the market.

## Market Trends:

Following are the market trend for Cytostatic Hormone Therapy market.

1. Increasing Demand for Cytostatic Hormone Antagonists Products: There is a growing demand for Cytostatic Hormone Antagonists because of rise in targeted cancer therapy. Companies that offer a diverse range of specialized products are likely to gain a

competitive advantage. The year over year growth rate of Cytostatic Hormone Antagonists is 19% and CAGR of 1%.

2. Rising demand for cancer therapy: As discussed, the prevalence rate of cancer is high in European nations.

3. Availability of generics.

**Market Challenges:**

1. Regulatory policies: The Cytostatic Hormone Therapy market in Europe is subject to stringent regulatory requirements, including product registrations, safety assessments, and compliance with quality standards. Companies must invest in research and development, testing, and regulatory affairs to meet these requirements.
2. Cytotoxic chemotherapy: The chemotherapy often involves cytotoxicity in patients. Companies has to understand patient's needs and provide with better products with less cytotoxicity.

**Market Opportunities:**

1. Ageing Population: The increasing aging population in Europe presents an opportunity for the Cytostatic Hormone Therapy market.

2. Inclanation towards targeted therapies: European population has a preference for targeted cancer therapy. When compared to standard chemotherapy, targeted treatments provide personalised treatment choices that selectively target cancer cells, resulting in greater efficacy and lower adverse effects.

# Market Analysis Report for Immunostimulating agents Market in Europe

The following study analyses the European Immunostimulating agents market, concentrating on key products, market trends, growth rate, and competitive landscape. The Immunostimulating agents market constitute to 2% of the total market. The report is built using the provided data table 3.

## Executive Summary:

The Immunostimulating agents market in Europe is witnessing a growth due to factors such as europe's ageing population, the development of new and more effective cancer therapies and increasing acceptance for biosimilars.. The market is showing a growth. Key trends include the

## Market Overview:

Immunostimulating agents refer to pharmaceutical products and therapies used for the prevention and treatment of multiple types of Cancer. These Incudes products containing Interforns, ancestim, empegfilgrastim, filgrastim, lenograstim, molgramostim, pegfilgrastim, sargramostim

## Market Size and Growth:

The Immunostimulating agents market in Europe has experienced growth in recent years. As per the data table, the total market size for Immunostimulating agents in Europe reached 1562 million euros in the MAT 2022 Q3 period. The market is expected to witness further growth.

## Market Segmentation:

Product Segmentation:

Based on the data tables provided, the Immunostimulating agents market in Europe can be segmented into various product categories, including:

- Immunostimulating Agents Excluding Interferons
- Interferons

Geographic Segmentation:

The European Immunostimulating agents market is further subdivided into geographical areas, which include EMA nations, non-EMA countries, the Key 5 countries, and the rest of Europe. Market dynamics, regulatory frameworks, and consumer preferences may differ by area.

## Competitive Landscape:

The Immunostimulating agents market in Europe is very competetive, with 162 products and 153 corporations, with several multinational and local players. Key players operating in the market are, Novartis, Intas, Amgen, and many others. These companies compete on factors such as product innovation, brand reputation, pricing, and distribution channels. Strategic partnerships, mergers, and acquisitions are common strategies employed to gain a competitive edge in the market.

## Market Trends:

Following are the market trend for Immunostimulating agents market.

1. Increasing Demand for Immunostimulating products exluding interferons like, filgrastim, pegfilgrastim, Products: There is a growing demand for Immunostimulating products exluding interferons like, filgrastim, pegfilgrastim, because of rise in rise of biosimilar alternative. Companies that offer a diverse range of specialized products are likely to gain

a competitive advantage. The year over year growth rate of Immunostimulating products exluding interferons like, filgrastim, pegfilgrastim, is 5% and CAGR of 2%.

2. Rising demand for cancer therapy.

3. Availability of Biosimilars.

**Market Challenges:**
Regulatory policies

The Immunostimulating agents market in Europe is subject to stringent regulatory requirements, including product registrations, safety assessments, and compliance with quality standards. Companies must invest in research and development, testing, and regulatory affairs to meet these requirements.

Rising Biosimilars

**Market Opportunities:**
Rising Prevalance of Cancer
The increasing aging population in Europe presents an opportunity for the Immunostimulating agents market.

Inclanation towards biosimilars

# Market Analysis Report for Immunosuppresants Market in Europe

The following study analyses the European Immunosuppresants market, concentrating on key products, market trends, growth rate, and competitive landscape. The Immunosuppresants market constitute to 25% of the total market. The report is built using the provided data table 3.

## Executive Summary:

The Immunosuppresants market in Europe is witnessing a steady growth due to factors such as europe's ageing population, the development of new and more effective cancer therapies and increasing acceptance for biosimilars.. The market is showing a steady growth. Key trends include the

## Market Overview:

Immunosuppresants refer to pharmaceutical products and therapies used for the prevention and treatment of multiple types of Cancer. These Includes anti-TNF products, Interlukin inhibitors and other immunosuppresants

## Market Size and Growth:

The Immunosuppresants market in Europe has experienced steady growth in recent years. As per the data table, the total market size for Immunosuppresants in Europe reached 18803 million euros in the MAT 2022 Q3 period. The market is expected to witness further growth.

## Market Segmentation:

Product Segmentation:

Based on the data tables provided, the Immunosuppresants market in Europe can be segmented into various product categories, including:

- Anti-Tnf Products
- Interleukin Inhibitors
- Other Immunosuppresants

Geographic Segmentation:

The European Immunosuppresants market is further subdivided into geographical areas, which include EMA nations, non-EMA countries, the Key 5 countries, and the rest of Europe. Market dynamics, regulatory frameworks, and consumer preferences may differ by area.

## Competitive Landscape:

The Immunosuppresants market in Europe is competetive, with 238 products and 195 corporations, with several multinational and local players. Key players operating in the market are, Novartis, Jhonson & Johnson, Abbvie, and many others. These companies compete on factors such as product innovation, brand reputation, pricing, and distribution channels. Strategic partnerships, mergers, and acquisitions are common strategies employed to gain a competitive edge in the market.

## Market Trends:

Following are the market trend for Immunosuppresants market.

1. Increasing Demand for Products containing anti-TNF substances like adalimumab Products: There is a growing demand for Products containing anti-TNF substances like adalimumab because of rise in rise of biosimilar alternative. Companies that offer a diverse

range of specialized products are likely to gain a competitive advantage. The year over year growth rate of Products containing anti-TNF substances like adalimumab is 11% and CAGR of 6%.

2. Rising demand for cancer therapy.

3. Availability of Biosimilars.

**Market Challenges:**

Regulatory policies

The Immunosuppresants market in Europe is subject to stringent regulatory requirements, including product registrations, safety assessments, and compliance with quality standards. Companies must invest in research and development, testing, and regulatory affairs to meet these requirements.

Rising Biosimilars

**Market Opportunities:**

Rising Prevalance of Cancer

The increasing aging population in Europe presents an opportunity for the Immunosuppresants market.

Inclanation towards biosimilars

# Report on Insulin Glargine market in Europe

The insulin glargine market in Europe is dominated by the reference product Lantus, but biosimilars like Abasaglar are gaining ground with their growing market share and revenue. Nonreference products like Ringlar are also growing in certain markets, showing potential for future growth.

## Overview

Insulin Glargine is a long-acting insulin analog used to treat people with type1 or type2 diabetes. In Europe, there are several brands of insulin gla rgine available in the market, including reference products and biosimilars. In this report, we analyze the performance of different brands of insulin gla rgine in terms of revenue, growth rate, and market share.

## Market Share

Lantus, the reference product manufactured by Sanofi, is the dominant player in the market, with an average market share of 85.5% between 2020 and 2022.

However, its market share has been declining over the years, with a Year over Year-growth rate of -2.5% in 2021
2022. On the other hand, the biosimilar Abasaglar, produced by Lilly, has been growing and now holds an average market share of 12.5%, with a YoY growth rate of 5.6% in 2021-2022.

## Revenue

Lantus has the highest average revenue of €1.4 bn. between 2020 and 2022. However, its revenue has been declining with a YoY growth rate of -3.7% in 2021-2022.

The biosimilar Abasaglar has an average revenue of €168 mn. between ’20 and ’22, which has been growing with a YoY growth rate of 6.5% in 2 021-2022.

## Growth Rate

Most of the brands in the insulin glargine market have been declining in terms of revenue and growth rate. However, Abasaglar and Ringlar, a no n-
reference product produced by Geropharm in Russia and Kazakhstan, have been growing with YoY growth rates of 6.5% and 4.1% respectively in 20 21-2022.

## Brand Performance

Lantus, the reference product, has been declining in terms of revenue and market share. On the other hand, the biosimilar Abasaglar has been gro wing in both revenue and market share, showing a positive trend in the market. Other non-

reference products like Ringlar, produced by Geropharm, have also been gr owing in the market.

## Insulin Aspart Market in Europe

This report provides an analysis of the insulin aspart market in Europe, focusi ng on brand performance, revenue, growth rate, and market share. The data used in this report covers the period from Q3 2020 to Q3 2022.

### Overview

The insulin aspart market in Europe experienced growth during the period un der review, with total revenue increasing from €788.6 million in Q3 2020 to €821.0 million in Q3 2022. The market is dominated by biosimilar products, with the reference product, Novorapid, holding a 97.96% market share in Q 3 2022.

### Market Share

Novorapid, produced by Novo Nordisk, maintained its dominance in the insulin aspart market in Europe, holding a market share of 97.96% in Q3 2022. Biosimilar products held the remaining 2.04% of the market, with the top-performing biosimilar brand being Sanofi's Insulin Aspar SNFI, which held a m arket share of 0.02%.

### Revenue

Novorapid generated the highest revenue in the insulin aspart market, with t otal revenue of €782.5 million in Q3 2022, representing a recovering trend c ompared to the previous year. Among the biosimilar brands, Insulin Aspar SN FI generated the highest average revenue of €9.3 million during the period under review, with a growing trend.

### Growth Rate

The biosimilar brands in the insulin aspart market experienced a positive gro wth rate, with an average annual growth rate (AAGR) of 11.19% and a co mpound annual growth rate (CAGR) of 1.35% during the period under review. Insulin Aspar SNFI had the highest year-on-year (YoY) growth rate of 801.47% in 2021-2022 and 401.36% in 2020-2021.

### Brand Performance

Among the biosimilar brands, Insulin Aspar SNFI performed the best, with a growing trend in revenue and market share. Rinfst, a non-reference product from Medsintez, also experienced a growing trend in revenu e and market share during the period under review. The biosimilar brands l aunched in 2020, such as EurimPharm's INSUL.ASP.SA.EUP and BModesto's INSU L.ASPAR-OF-B+O, have yet to gain significant market share.

# Insulin Lispro Market in Europe

This report provides an overview of the Insulin Lispro market in Europe, with a focus on brand performance, market share, revenue, and growth rate. Insulin Lispro is a type of insulin used to treat diabetes, and it is available as a reference product and biosimilar.

## Overview

The Insulin Lispro market in Europe is dominated by biosimilar brands from Sanofi, with INS. LISPRO SNFI being the leading brand. The market share and revenue trend for Insulin Lispro in Europe are generally growing. Sanofi's INS. LISPRO SNFI is the top-performing brand, with strong YoY growth rates. However, Lilly's HUMALOG also showed impressive YoY growth rates in 2021-2022.

## Market Share

The market share of Insulin Lispro in Europe is dominated by biosimilars from Sanofi, with INS. LISPRO SNFI being the leading brand with a market share of 98.05% in 2022. The remaining market share is held by reference product HUMALOG from Lilly with a market share of 0.32%.

## Revenue and Growth Rate

The revenue trend for Insulin Lispro in Europe is generally growing. INS. LISPRO SNFI from Sanofi had an average revenue of €24,180,235 from 2020-2022, with a YoY growth rate of 16.22% (2021-2022) and 1.36% (2020-2021). HUMALOG from Lilly had an average revenue of €47,524.5 in 2021, and its revenue trend is growing with a YoY growth rate of 740.43% (2021-2022).

## Brand Performance

Sanofi's INS. LISPRO SNFI is the top-performing brand in the Insulin Lispro market in Europe, with a YoY growth rate of 16.22% and a market share of 98.05% in 2022. Other biosimilar brands from Sanofi, INSUL.LIS.SA.AB8>> and INSUL.LIS.SA.E-M>>, also showed significant YoY growth rates of 54.20% and 512.12%, respectively. The reference product HUMALOG from Lilly had a YoY growth rate of 740.43% in 2021-2022.

# Triparatide Market in Europe

Triparatide market in Europe is shifting towards biosimilars due to their lower cost, with MOVYMIA and TERROSA showing strong growth in revenue and market share. The reference product FORTEO is losing market share to the biosimilars. The Generics market is also showing significant growth in revenue and market share.

## Overview

Triparatide is a medication used to treat osteoporosis, a bone disease that weakens bones and makes them more susceptible to fractures. In Europe, Triparatide is available in both reference and biosimilar versions, with the biosimilars gaining popularity in recent years due to their lower cost.

## Market Share and Revenue

As of Q3 2022, the total revenue for Triparatide in Europe was €198.6 million. The market share of the reference product FORTEO, manufactured by Lilly, decreased from 71.7% in 2020 to 48.4% in 2022. On the other hand, biosimilars such as MOVYMIA (STADA) and TERROSA (GEDEON RICHTER) gained market share, with MOVYMIA capturing 21% of the market share and TERROSA capturing 9.3%. The Generics Total segment also saw significant growth in revenue and market share, with a YoY growth rate of 11.0% in 2021-22.

## Growth Rate

The overall Triparatide market in Europe has seen a decline in revenue growth rate, with a YoY growth rate of -0.14% in 2020-
2021 and 0.03% in 2021-
2022. However, several biosimilars such as MOVYMIA and TERROSA showed strong growth rates, with 1.54% and 1.44%, respectively.

## Brand Performance

Among the biosimilars, MOVYMIA (STADA) showed the highest revenue growth rate, with a YoY growth rate of 1.54% in 2021-
2022. TERROSA (GEDEON RICHTER) also showed strong growth, with a YoY growth rate of 1.44%. LIVOGIVA (THERAMEX) is a new player in the Triparatide market, with revenue growth rate trending upwards.

| N: NERVOUS SYSTEM | | | | | | | | | | | Growth Rate | | | | Market Share | | | | Product Count | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Therapeutic Category | | Revenue MAT 2022 Q3 | Revenue MAT 2021 Q3 | Revenue MAT 2020 Q3 | Average Revenue (Of three years) | Units MAT 2022 Q3 | Units MAT 2021 Q3 | Units MAT 2020 Q3 | Average Units (Of three years) | YoY GR1 | YoY GR2 | AAGR | CAGR | MS 2022 | MS 2021 | MS 2020 | Average MS | Total Count of Products | Count of Non-Generic Products | Count of Generic Products | Count of Biosimilar Products | Other Category Products |
| **N1** | **ANAESTHETICS** | **€ 1,850,910,493** | **€ 1,871,288,511** | **€ 1,710,481,189** | **€ 1,810,893,398** | **383,232,417** | **394,678,808** | **368,506,957** | **382,139,394** | **2%** | **9%** | **6%** | **3%** | **5%** | **5%** | **5%** | **5%** | **867** | **122** | **713** | **0** | **32** |
| N1A | ANAESTHETICS GENERAL | € 1,192,888,243 | € 1,258,688,429 | € 1,115,056,236 | € 1,188,877,636 | 182,307,879 | 200,950,164 | 178,417,239 | 187,225,094 | -5% | 13% | 4% | 2% | 3% | 4% | 3% | 3% | 352 | 38 | 299 | | 15 |
| N1B | ANAESTHETICS, LOCAL | € 658,022,250 | € 612,600,082 | € 595,424,953 | € 622,015,762 | 200,924,538 | 193,728,644 | 190,089,718 | 194,914,300 | 7% | 3% | 5% | 3% | 2% | 2% | 2% | 2% | 515 | 84 | 414 | | 17 |
| **N2** | **ANALGESICS** | **€ 7,717,647,769** | **€ 6,977,551,783** | **€ 6,987,574,424** | **€ 7,227,591,325** | **3,763,228,202** | **3,453,664,864** | **3,614,244,451** | **3,610,379,172** | **11%** | **0%** | **5%** | **3%** | **21%** | **20%** | **21%** | **21%** | **2597** | **339** | **2167** | **0** | **91** |
| N2A | NARCOTIC ANALGESICS | € 2,023,411,318 | € 2,083,742,649 | € 2,147,002,679 | € 2,084,718,882 | 227,743,573 | 226,180,194 | 235,288,960 | 229,737,576 | -3% | -3% | -3% | -2% | 6% | 6% | 7% | 6% | 467 | 72 | 384 | | 11 |
| N2B | NON-NARCOTIC ANALGESICS | € 4,690,724,367 | € 4,091,888,948 | € 4,193,572,271 | € 4,325,395,195 | 3,473,963,869 | 3,168,592,279 | 3,323,720,494 | 3,322,092,214 | 15% | -2% | 6% | 4% | 13% | 12% | 13% | 13% | 1802 | 216 | 1540 | | 46 |
| N2C | ANTI-MIGRAINE PREPS | € 1,003,512,084 | € 801,920,186 | € 646,999,474 | € 817,477,248 | 61,520,760 | 58,892,391 | 55,234,997 | 58,549,383 | 25% | 24% | 25% | 16% | 3% | 2% | 2% | 2% | 328 | 51 | 243 | | 34 |
| **N3** | **N3 ANTI-EPILEPTICS** | **€ 3,721,698,519** | **€ 3,584,922,830** | **€ 3,542,078,170** | **€ 3,616,233,173** | **538,448,443** | **524,571,111** | **523,854,193** | **528,957,916** | **4%** | **1%** | **3%** | **2%** | **10%** | **10%** | **11%** | **10%** | **992** | **80** | **901** | **0** | **11** |
| N3A | ANTI-EPILEPTICS | € 3,721,698,519 | € 3,584,922,830 | € 3,542,078,170 | € 3,616,233,173 | 538,448,443 | 524,571,111 | 523,854,193 | 528,957,916 | 4% | 1% | 3% | 2% | 10% | 10% | 11% | 10% | 992 | 80 | 901 | | 11 |
| **N4** | **N4 ANTI-PARKINSON PREPS** | **€ 1,398,683,244** | **€ 1,397,115,364** | **€ 1,437,763,918** | **€ 1,411,187,509** | **163,237,478** | **159,632,729** | **166,522,619** | **163,130,942** | **0%** | **-3%** | **-1%** | **-1%** | **4%** | **4%** | **4%** | **4%** | **451** | **47** | **401** | **0** | **3** |
| N4A | ANTI-PARKINSON PREPS | € 1,398,683,244 | € 1,397,115,364 | € 1,437,763,918 | € 1,411,187,509 | 163,237,478 | 159,632,729 | 166,522,619 | 163,130,942 | 0% | -3% | -1% | -1% | 4% | 4% | 4% | 4% | 451 | 47 | 401 | | 3 |
| **N5** | **N5 PSYCHOLEPTICS** | **€ 5,331,435,682** | **€ 5,238,893,044** | **€ 5,199,607,223** | **€ 5,256,645,316** | **1,626,578,523** | **1,640,902,703** | **1,677,910,816** | **1,648,464,014** | **2%** | **1%** | **1%** | **1%** | **15%** | **15%** | **16%** | **15%** | **2783** | **353** | **1674** | **0** | **756** |
| N5A | ANTIPSYCHOTICS | € 3,497,961,138 | € 3,471,198,028 | € 3,458,745,975 | € 3,475,968,380 | 529,843,219 | 524,146,857 | 530,348,168 | 528,112,748 | 1% | 0% | 1% | 0% | 10% | 10% | 11% | 10% | 973 | 96 | 873 | | 4 |
| N5B | HYPNOTICS & SEDATIVES | € 996,970,085 | € 938,133,021 | € 914,345,266 | € 949,816,124 | 509,225,501 | 520,139,795 | 546,250,779 | 525,205,358 | 6% | 3% | 4% | 3% | 3% | 3% | 3% | 3% | 1311 | 173 | 395 | | 743 |
| N5C | TRANQUILLISERS | € 836,504,459 | € 829,561,995 | € 826,515,982 | € 830,860,812 | 587,509,803 | 596,616,051 | 601,311,869 | 595,145,908 | 1% | 0% | 1% | 0% | 2% | 2% | 3% | 2% | 499 | 84 | 406 | | 9 |
| **N6** | **N6 PSYCHOANALEPTICS** | **€ 3,984,096,435** | **€ 3,905,441,963** | **€ 3,757,220,705** | **€ 3,882,253,034** | **927,096,132** | **887,405,278** | **882,865,054** | **899,122,155** | **2%** | **4%** | **3%** | **2%** | **11%** | **11%** | **11%** | **11%** | **1895** | **198** | **1470** | **0** | **227** |
| N6A | ANTIDEPRESS.& MOOD STAB. | € 2,883,769,557 | € 2,945,168,516 | € 2,817,620,357 | € 2,882,186,143 | 776,793,973 | 740,446,669 | 729,119,798 | 748,786,813 | -2% | 5% | 1% | 1% | 8% | 9% | 9% | 8% | 1463 | 114 | 1213 | | 136 |
| N6B | PSYCHOSTIMULANTS | € 606,293,893 | € 545,088,365 | € 503,867,899 | € 551,750,052 | 27,949,057 | 24,788,723 | 23,018,709 | 25,252,163 | 11% | 8% | 10% | 6% | 2% | 2% | 2% | 2% | 109 | 22 | 80 | | 7 |
| N6C | PSYCHOLEPT-PSYCHOANALEPT | € 17,631,604 | € 17,598,075 | € 17,529,867 | € 17,586,515 | 3,228,621 | 3,280,523 | 3,281,853 | 3,263,666 | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 15 | 11 | 4 | | 0 |
| N6D | NOOTROPICS | € 308,967,018 | € 270,071,941 | € 278,869,596 | € 285,969,518 | 68,697,714 | 67,302,240 | 71,117,467 | 69,039,140 | 14% | -3% | 6% | 3% | 1% | 1% | 1% | 1% | 209 | 34 | 142 | | 33 |
| N6E | NEUROTONICS+OTHER PREPS | € 167,434,363 | € 127,515,066 | € 139,332,986 | € 144,760,805 | 50,426,767 | 51,587,123 | 56,327,227 | 52,780,372 | 31% | -8% | 11% | 6% | 0% | 0% | 0% | 0% | 99 | 17 | 31 | | 51 |
| **N7** | **N7 OTHER CNS DRUGS** | **€ 12,259,650,793** | **€ 11,388,074,779** | **€ 10,233,948,091** | **€ 11,293,891,221** | **317,426,720** | **309,412,196** | **315,218,757** | **314,019,224** | **8%** | **11%** | **9%** | **6%** | **34%** | **33%** | **31%** | **33%** | **1144** | **160** | **914** | **0** | **70** |
| N7A | MULTIPLE SCLEROSIS PRODUCTS | € 6,892,669,317 | € 6,321,401,910 | € 5,983,575,503 | € 6,399,215,577 | 34,018,105 | 31,988,255 | 35,228,975 | 33,745,112 | 9% | 6% | 7% | 5% | 19% | 18% | 18% | 19% | 89 | 28 | 57 | | 4 |
| N7B | ANTISMOKING PRODUCTS | € 456,364,483 | € 495,809,762 | € 525,143,404 | € 492,439,216 | 57,023,810 | 53,139,779 | 52,965,044 | 54,376,211 | -8% | -6% | -7% | -5% | 1% | 1% | 2% | 1% | 45 | 7 | 28 | | 10 |
| N7C | ANTIVERTIGO PRODUCTS | € 269,058,014 | € 252,375,379 | € 254,990,002 | € 258,807,798 | 71,060,373 | 68,080,286 | 67,912,719 | 69,017,793 | 7% | -1% | 3% | 2% | 1% | 1% | 1% | 1% | 161 | 18 | 133 | | 10 |
| N7D | ANTI-ALZHEIMER PRODUCTS | € 567,772,578 | € 560,944,942 | € 595,196,971 | € 574,638,164 | 41,362,102 | 40,182,286 | 42,017,801 | 41,187,396 | 1% | -6% | -2% | -2% | 2% | 2% | 2% | 2% | 399 | 16 | 381 | | 2 |
| N7E | DRUGS USED IN ALCOH DEP | € 67,561,047 | € 63,377,848 | € 65,766,790 | € 65,568,562 | 12,824,156 | 12,785,071 | 13,488,246 | 13,032,491 | 7% | -4% | 1% | 1% | 0% | 0% | 0% | 0% | 60 | 9 | 39 | | 12 |
| N7F | DRUGS USED IN OPIOID DEP | € 308,449,781 | € 302,355,074 | € 297,268,618 | € 302,691,158 | 53,706,243 | 56,001,907 | 58,057,816 | 55,921,989 | 2% | 2% | 2% | 1% | 1% | 1% | 1% | 1% | 113 | 18 | 93 | | 2 |
| N7X | ALL OTHER CNS DRUGS | € 3,697,775,573 | € 3,391,809,864 | € 2,512,006,803 | € 3,200,530,747 | 47,431,931 | 47,234,612 | 45,548,156 | 46,738,233 | 9% | 35% | 22% | 14% | 10% | 10% | 8% | 9% | 277 | 64 | 183 | | 30 |
| **TOTAL NERVOUS** | | **€ 36,264,122,935** | **€ 34,363,288,274** | **€ 32,868,673,720** | **€ 34,498,694,976** | **7,719,247,915** | **7,370,267,689** | **7,549,122,847** | **7,546,212,817** | **6%** | **5%** | **5%** | **3%** | **100%** | **100%** | **100%** | **100%** | **10729** | **1299** | **8240** | **0** | **1190** |

**Table 4: Nervous System**

| A: Alimentary tract and metabolism | | | | | | | | | | Growth Rate | | | | Market Share | | | | Product Count | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Therapeutic Category | Revenue MAT 2022 Q3 | Revenue MAT 2021 Q3 | Revenue MAT 2020 Q3 | Average Revenue (Of three years) | Units MAT 2022 Q3 | Units MAT 2021 Q3 | Units MAT 2020 Q3 | Average Units (Of three years) | YoY GR1 | YoY GR2 | AAGR | CAGR | MS 2022 | MS 2021 | MS 2020 | Average I | Total Count of Products | Count of Non-Generic Products | Count of Generic Products | Count of Biosimilar Products | Other Category Products |
| **A1** | **STOMATOLOGICALS, MOUTH PREPARATIONS, MEDICINAL DENTIFRICES** | **€ 426,145,901** | **€ 397,272,526** | **€ 401,268,589** | **€ 408,229,005** | **311,746,895** | **316,474,970** | **327,930,684** | **318,717,516** | **7%** | **-1%** | **3%** | **2%** | **1%** | **1%** | **1%** | **1%** | **561** | **111** | **110** | **0** | **340** |
| A1A | Stomatologicals | € 378,023,813 | € 350,951,066 | € 352,459,916 | € 360,478,265 | 295,275,575 | 300,059,662 | 310,901,398 | 302,078,878 | 8% | 0% | 4% | 2% | 1% | 1% | 1% | 1% | 513 | 99 | 76 | 0 | 338 |
| A1B | Mouth Antifungals | € 48,122,088 | € 46,321,460 | € 48,808,673 | € 47,750,740 | 16,471,320 | 16,415,308 | 17,029,286 | 16,638,638 | 4% | -5% | -1% | 0% | 0% | 0% | 0% | 0% | 48 | 12 | 34 | 0 | 2 |
| **A2** | **ANTACIDS, ANTIFLATULENTS AND ANTI-ULCERANTS** | **€ 3,776,392,692** | **€ 3,647,208,866** | **€ 3,620,503,101** | **€ 3,681,368,220** | **1,526,312,905** | **1,500,060,093** | **1,486,270,498** | **1,504,214,499** | **4%** | **1%** | **2%** | **1%** | **12%** | **13%** | **13%** | **12%** | **1767** | **125** | **971** | **0** | **671** |
| A2A | ANTACIDS ANTIFLATULENTS | € 663,994,251 | € 625,857,551 | € 629,555,866 | € 639,802,556 | 267,509,972 | 268,194,404 | 260,778,960 | 265,494,445 | 6% | -1% | 3% | 2% | 2% | 2% | 2% | 2% | 434 | 14 | 6 | 0 | 414 |
| A2B | ANTIULCERANTS | € 3,009,736,455 | € 2,929,158,393 | € 2,904,115,538 | € 2,947,670,129 | 1,233,462,565 | 1,208,340,424 | 1,201,238,004 | 1,214,346,998 | 3% | 1% | 2% | 1% | 9% | 10% | 10% | 10% | 1101 | 95 | 962 | 0 | 44 |
| A2X | OTHER STOMACH DISORDER PRODUCTS | € 102,661,986 | € 92,192,922 | € 86,831,697 | € 93,895,535 | 25,340,368 | 23,525,265 | 24,253,534 | 24,373,056 | 11% | 6% | 9% | 6% | 0% | 0% | 0% | 0% | 232 | 16 | 3 | 0 | 213 |
| **A3** | **FUNCTIONAL GASTRO-INTESTINAL DISORDER DRUGS** | **€ 876,718,865** | **€ 788,831,145** | **€ 785,360,762** | **€ 816,970,257** | **439,195,170** | **420,184,614** | **430,363,513** | **429,914,432** | **11%** | **0%** | **6%** | **4%** | **3%** | **3%** | **3%** | **3%** | **667** | **106** | **473** | **0** | **88** |
| A3A | ANTISPASM+ANTICHOL PLAIN | € 420,292,754 | € 378,734,152 | € 378,352,988 | € 392,459,965 | 214,504,472 | 203,011,635 | 208,149,162 | 208,555,090 | 11% | 0% | 6% | 4% | 1% | 1% | 1% | 1% | 343 | 34 | 231 | 0 | 78 |
| A3C | ANTISPASMODIC/ATARACTIC COMBINATIONS | € 13,146,055 | € 14,493,609 | € 14,275,600 | € 13,971,755 | 4,829,425 | 5,170,415 | 4,747,326 | 4,915,722 | -9% | 2% | -4% | -3% | 0% | 0% | 0% | 0% | 10 | 7 | 2 | 0 | 1 |
| A3D | ANTISPASMODIC/ANALGESIC COMBINATIONS | € 76,179,122 | € 63,108,620 | € 65,653,195 | € 68,313,646 | 43,801,900 | 45,092,465 | 46,636,236 | 45,176,867 | 21% | -4% | 8% | 5% | 0% | 0% | 0% | 0% | 43 | 17 | 26 | 0 | 0 |
| A3E | ANTISPASMODICS COMBINED WITH OTHER PRODUCTS | € 50,081,590 | € 49,696,128 | € 49,316,438 | € 49,698,052 | 21,727,027 | 21,658,651 | 21,417,479 | 21,601,052 | 1% | 1% | 1% | 1% | 0% | 0% | 0% | 0% | 23 | 10 | 4 | 0 | 9 |
| A3F | GASTROPROKINETICS | € 300,227,910 | € 268,223,882 | € 264,751,938 | € 277,734,577 | 153,603,286 | 144,587,945 | 148,815,378 | 149,002,203 | 12% | 1% | 7% | 4% | 1% | 1% | 1% | 1% | 242 | 33 | 209 | 0 | 0 |
| A3G | GI SENSORIMOTOR MODULATORS | € 16,791,434 | € 14,574,754 | € 13,010,603 | € 14,792,264 | 729,060 | 663,503 | 597,932 | 663,498 | 15% | 12% | 14% | 9% | 0% | 0% | 0% | 0% | 6 | 5 | 1 | 0 | 0 |
| **A4** | **ANTIEMETICS AND ANTINAUSEANTS** | **€ 611,940,483** | **€ 557,370,850** | **€ 567,005,702** | **€ 578,772,345** | **107,353,536** | **90,054,437** | **93,666,376** | **97,024,783** | **10%** | **-2%** | **4%** | **3%** | **2%** | **2%** | **2%** | **2%** | **447** | **56** | **330** | **0** | **61** |
| A4A | ANTIEMETICS AND ANTINAUSEANTS | € 611,940,483 | € 557,370,850 | € 567,005,702 | € 578,772,345 | 107,353,536 | 90,054,437 | 93,666,376 | 97,024,783 | 10% | -2% | 4% | 3% | 2% | 2% | 2% | 2% | 447 | 56 | 330 | 0 | 61 |
| **A5** | **CHOLAGOGUES AND HEPATIC PROTECTORS** | **€ 988,085,173** | **€ 826,269,086** | **€ 791,310,325** | **€ 868,554,861** | **157,185,041** | **157,139,667** | **151,116,895** | **155,147,201** | **20%** | **4%** | **12%** | **8%** | **3%** | **3%** | **3%** | **3%** | **661** | **47** | **14** | **0** | **600** |
| A5A | BILE THERAPY+CHOLAGOGUES | € 514,722,844 | € 436,541,205 | € 409,873,306 | € 453,712,452 | 71,862,499 | 70,777,069 | 72,351,237 | 71,663,602 | 18% | 7% | 12% | 8% | 2% | 1% | 1% | 2% | 332 | 19 | 7 | 0 | 306 |
| A5B | HEPATIC PROCT LIPOTROPIC | € 471,790,051 | € 388,375,890 | € 380,022,234 | € 413,396,058 | 85,092,304 | 86,150,495 | 78,550,742 | 83,264,514 | 21% | 2% | 12% | 7% | 1% | 1% | 1% | 1% | 322 | 28 | 7 | 0 | 287 |
| A5C | CHOLAGOGUE/LIPOTROPIC COMBINATIONS | € 1,572,278 | € 1,351,991 | € 1,414,785 | € 1,446,351 | 230,238 | 212,103 | 214,916 | 219,086 | 16% | -4% | 6% | 4% | 0% | 0% | 0% | 0% | 7 | 0 | 0 | 0 | 7 |
| **A6** | **DRUGS FOR CONSTIPATION AND BOWEL CLEANSERS** | **€ 1,423,880,716** | **€ 1,349,133,130** | **€ 1,300,145,234** | **€ 1,357,719,693** | **540,335,693** | **544,058,005** | **543,914,563** | **542,769,420** | **6%** | **4%** | **5%** | **3%** | **4%** | **5%** | **5%** | **5%** | **1037** | **61** | **196** | **0** | **780** |
| A6A | DRUGS FOR CONSTIPATION | € 1,250,031,759 | € 1,193,204,779 | € 1,154,241,873 | € 1,199,159,470 | 509,593,117 | 513,385,037 | 512,187,416 | 511,721,857 | 5% | 3% | 4% | 3% | 4% | 4% | 4% | 4% | 991 | 60 | 196 | 0 | 735 |
| A6B | BOWEL CLEANSERS | € 173,848,957 | € 155,928,351 | € 145,903,361 | € 158,560,223 | 30,742,576 | 30,672,968 | 31,727,147 | 31,047,564 | 11% | 7% | 9% | 6% | 1% | 1% | 1% | 1% | 46 | 1 | 0 | 0 | 45 |
| **A7** | **INTESTINAL DISORDER PRODUCTS** | **€ 3,621,176,729** | **€ 3,121,579,277** | **€ 2,895,848,647** | **€ 3,212,868,218** | **437,042,155** | **402,380,311** | **418,533,210** | **419,318,559** | **16%** | **8%** | **12%** | **8%** | **11%** | **11%** | **10%** | **11%** | **1141** | **99** | **343** | **0** | **699** |
| A7A | INTESTINAL ANTI-INFECTIVES | € 377,228,400 | € 307,051,427 | € 291,214,804 | € 325,164,877 | 60,329,370 | 53,284,592 | 54,657,034 | 56,090,332 | 23% | 5% | 14% | 9% | 1% | 1% | 1% | 1% | 121 | 30 | 76 | 0 | 15 |
| A7B | INTEST ADSORBENT ANTIDIA | € 162,177,570 | € 128,152,202 | € 135,477,075 | € 141,935,616 | 108,792,928 | 112,187,734 | 116,789,073 | 112,589,912 | 27% | -5% | 11% | 6% | 0% | 0% | 0% | 0% | 158 | 7 | 3 | 0 | 148 |
| A7E | INFLAMMATORY BOWEL DISORDER PRODUCTS | € 2,339,272,030 | € 2,101,987,996 | € 1,836,978,790 | € 2,092,746,272 | 45,375,875 | 44,829,285 | 44,144,717 | 44,783,292 | 11% | 14% | 13% | 8% | 7% | 7% | 7% | 7% | 155 | 25 | 127 | 0 | 3 |
| A7F | ANTIDIARR MICRO-ORGANISM | € 452,919,300 | € 370,066,877 | € 397,124,991 | € 406,703,723 | 91,702,206 | 82,120,651 | 85,193,117 | 86,338,658 | 22% | -7% | 8% | 4% | 1% | 1% | 1% | 1% | 441 | 13 | 1 | 0 | 427 |
| A7G | ORAL ELECTROLYTE REPLACERS | € 29,207,294 | € 16,397,122 | € 18,453,297 | € 21,352,571 | 9,391,698 | 5,586,894 | 6,263,507 | 7,080,700 | 78% | -11% | 33% | 17% | 0% | 0% | 0% | 0% | 58 | 0 | 0 | 0 | 58 |
| A7H | MOTILITY INHIBITORS | € 212,465,335 | € 163,838,255 | € 177,650,058 | € 184,651,216 | 109,227,326 | 95,360,461 | 100,875,189 | 101,820,992 | 30% | -8% | 11% | 6% | 1% | 1% | 1% | 1% | 147 | 16 | 124 | 0 | 7 |
| A7X | INTESTINAL DISORDER PRODUCTS, OTHER | € 47,906,800 | € 34,085,398 | € 38,949,632 | € 40,313,943 | 12,222,752 | 9,010,694 | 10,610,573 | 10,614,673 | 41% | -12% | 14% | 7% | 0% | 0% | 0% | 0% | 61 | 8 | 12 | 0 | 41 |
| **A8** | **ANTIOBESITY PREPARATIONS, EXCLUDING DIETETICS** | **€ 429,931,377** | **€ 215,704,354** | **€ 171,293,620** | **€ 272,309,784** | **6,322,534** | **4,487,003** | **4,099,211** | **4,969,583** | **99%** | **26%** | **63%** | **36%** | **1%** | **1%** | **1%** | **1%** | **63** | **11** | **29** | **0** | **23** |
| A8A | A-OBESITY PREPS EXC DIET | € 429,931,377 | € 215,704,354 | € 171,293,620 | € 272,309,784 | 6,322,534 | 4,487,003 | 4,099,211 | 4,969,583 | 99% | 26% | 63% | 36% | 1% | 1% | 1% | 1% | 63 | 11 | 29 | 0 | 23 |
| **A9** | **DIGESTIVES, INCLUDING ENZYMES** | **€ 535,691,438** | **€ 470,669,854** | **€ 474,521,576** | **€ 493,627,623** | **162,410,377** | **158,457,815** | **164,605,270** | **161,824,487** | **14%** | **-1%** | **7%** | **4%** | **2%** | **2%** | **2%** | **2%** | **275** | **2** | **0** | **0** | **273** |
| A9A | DIGESTIVES, INCLUDING ENZYMES | € 535,691,438 | € 470,669,854 | € 474,521,576 | € 493,627,623 | 162,410,377 | 158,457,815 | 164,605,270 | 161,824,487 | 14% | -1% | 7% | 4% | 2% | 2% | 2% | 2% | 275 | 2 | 0 | 0 | 273 |
| **A10** | **DRUGS USED IN DIABETES** | **€ 14,136,007,158** | **€ 12,319,929,676** | **€ 11,591,633,835** | **€ 12,682,523,556** | **927,333,365** | **886,506,071** | **883,757,395** | **899,198,944** | **15%** | **6%** | **11%** | **7%** | **43%** | **42%** | **42%** | **42%** | **954** | **149** | **624** | **12** | **169** |
| A10C | HUMAN INSULIN+ANALOGUES | € 4,556,067,636 | € 4,500,365,981 | € 4,622,765,006 | € 4,559,732,874 | 141,292,324 | 142,527,651 | 143,062,634 | 142,294,203 | 1% | -3% | -1% | 0% | 14% | 15% | 17% | 15% | 77 | 54 | 10 | 12 | 1 |
| A10D | ANIMAL INSULINS | € 1,900,179 | € 1,968,768 | € 2,051,009 | € 1,973,319 | 80,790 | 80,123 | 73,981 | 78,298 | -3% | -4% | -4% | -3% | 0% | 0% | 0% | 0% | 9 | 1 | 0 | 0 | 8 |
| A10E | INSULIN DEVICES | € 140,883,681 | € 142,546,781 | € 142,649,496 | € 142,026,653 | 6,887,378 | 6,948,537 | 6,953,375 | 6,929,763 | -1% | 0% | -1% | 0% | 0% | 0% | 1% | 0% | 99 | 0 | 0 | 0 | 99 |
| A10H | SULPHONYLUREA A-DIABS | € 259,595,893 | € 264,530,189 | € 289,590,485 | € 271,238,856 | 112,451,414 | 115,733,299 | 121,724,927 | 116,636,547 | -2% | -9% | -5% | -4% | 1% | 1% | 1% | 1% | 228 | 12 | 215 | 0 | 1 |
| A10J | BIGUANIDE ANTIDIABETICS | € 643,623,334 | € 654,823,661 | € 666,598,796 | € 655,015,264 | 379,633,555 | 376,903,841 | 381,474,098 | 379,337,165 | -2% | -2% | -2% | -1% | 2% | 2% | 2% | 2% | 173 | 8 | 165 | 0 | 0 |
| A10K | GLITAZONE ANTIDIABETICS | € 62,762,734 | € 67,738,639 | € 74,692,209 | € 68,397,861 | 12,154,475 | 12,290,138 | 12,354,855 | 12,266,489 | -7% | -9% | -8% | -6% | 0% | 0% | 0% | 0% | 68 | 11 | 54 | 0 | 3 |
| A10L | A-GLUCOSIDASE INH A-DIAB | € 15,878,165 | € 17,912,759 | € 19,542,716 | € 17,777,880 | 4,536,728 | 4,939,075 | 5,821,821 | 5,099,208 | -11% | -8% | -10% | -7% | 0% | 0% | 0% | 0% | 30 | 3 | 27 | 0 | 0 |
| A10M | GLINIDE ANTIDIABETICS | € 40,401,220 | € 44,264,034 | € 48,436,317 | € 44,367,190 | 15,292,821 | 16,539,807 | 19,274,933 | 17,035,854 | -9% | -9% | -9% | -6% | 0% | 0% | 0% | 0% | 52 | 4 | 48 | 0 | 0 |
| A10N | DPP-IV INHIBITOR A-DIABS | € 2,480,547,425 | € 2,478,073,832 | € 2,515,409,818 | € 2,491,343,692 | 117,943,149 | 113,568,453 | 116,917,798 | 116,143,133 | 0% | -1% | -1% | 0% | 8% | 9% | 9% | 8% | 85 | 28 | 53 | 0 | 4 |
| A10P | SGLT2 INHIBITOR ANTIDIABETICS | € 2,815,801,845 | € 1,854,248,148 | € 1,407,689,038 | € 2,025,913,010 | 88,884,904 | 60,491,403 | 45,772,638 | 65,049,648 | 52% | 32% | 42% | 26% | 9% | 6% | 5% | 7% | 12 | 11 | 0 | 0 | 1 |
| A10S | GLP-1 AGONIST A-DIABS | € 3,020,848,702 | € 2,213,185,186 | € 1,717,663,734 | € 2,317,232,541 | 35,928,884 | 25,311,411 | 19,238,523 | 26,826,273 | 36% | 29% | 33% | 21% | 9% | 8% | 6% | 8% | 6 | 6 | 0 | 0 | 0 |
| A10X | OTHER DRUGS FOR DIABETES | € 97,696,344 | € 80,271,698 | € 84,545,211 | € 87,504,418 | 12,246,943 | 11,172,333 | 11,087,812 | 11,502,363 | 22% | -5% | 8% | 5% | 0% | 0% | 0% | 0% | 115 | 11 | 52 | 0 | 52 |
| **A11** | **VITAMINS** | **€ 1,990,928,863** | **€ 1,903,952,262** | **€ 1,685,932,652** | **€ 1,860,271,259** | **717,557,302** | **713,954,489** | **674,765,448** | **702,092,413** | **5%** | **13%** | **9%** | **6%** | **6%** | **7%** | **6%** | **6%** | **3254** | **10** | **0** | **0** | **3244** |
| A11A | MULTIVITAMINS + MINERALS | € 150,572,108 | € 145,334,311 | € 154,474,432 | € 150,126,950 | 30,775,456 | 31,394,376 | 30,602,374 | 30,924,069 | 4% | -6% | -1% | -1% | 0% | 0% | 1% | 1% | 766 | 5 | 0 | 0 | 761 |
| A11B | MULTIVIT WITHOUT MINERAL | € 20,998,562 | € 19,109,697 | € 21,981,035 | € 20,696,431 | 18,245,536 | 17,429,475 | 19,872,577 | 18,515,863 | 10% | -13% | -2% | -2% | 0% | 0% | 0% | 0% | 153 | 0 | 0 | 0 | 153 |
| A11C | VIT A & D INC. COMBS | € 1,023,903,892 | € 990,191,762 | € 808,723,284 | € 940,939,646 | 352,875,859 | 349,833,845 | 293,438,035 | 332,049,246 | 3% | 22% | 13% | 8% | 3% | 3% | 3% | 3% | 615 | 0 | 0 | 0 | 615 |
| A11D | VITAMIN B1 & COMBINATION | € 313,161,394 | € 283,893,007 | € 261,407,719 | € 286,154,040 | 108,959,021 | 103,604,361 | 99,433,250 | 103,998,877 | 10% | 9% | 9% | 6% | 1% | 1% | 1% | 1% | 233 | 1 | 0 | 0 | 232 |
| A11E | VITAMIN B COMPLEX | € 69,551,953 | € 69,939,809 | € 71,229,106 | € 70,240,289 | 21,986,459 | 23,857,841 | 24,488,680 | 23,444,327 | -1% | -2% | -1% | -1% | 0% | 0% | 0% | 0% | 205 | 1 | 0 | 0 | 204 |
| A11F | VITAMIN B12 PLAIN | € 111,619,394 | € 102,125,421 | € 91,398,863 | € 101,714,559 | 38,027,199 | 31,802,735 | 32,762,215 | 34,197,383 | 9% | 12% | 11% | 7% | 0% | 0% | 0% | 0% | 185 | 0 | 0 | 0 | 185 |
| A11G | VIT C INC.MINERAL COMBS | € 154,464,508 | € 149,419,724 | € 144,514,626 | € 149,466,286 | 94,248,899 | 102,641,255 | 120,712,781 | 105,867,645 | 3% | 3% | 3% | 2% | 0% | 1% | 1% | 1% | 519 | 1 | 0 | 0 | 518 |
| A11X | OTHER VITAMINS | € 146,657,052 | € 143,938,531 | € 132,203,587 | € 140,933,057 | 52,438,873 | 53,390,601 | 53,455,536 | 53,095,003 | 2% | 9% | 5% | 4% | 0% | 0% | 0% | 0% | 578 | 2 | 0 | 0 | 576 |
| **A12** | **MINERAL SUPPLEMENTS** | **€ 1,060,726,207** | **€ 995,617,642** | **€ 987,267,227** | **€ 1,014,537,025** | **423,486,526** | **409,565,929** | **407,002,252** | **413,351,569** | **7%** | **1%** | **4%** | **2%** | **3%** | **3%** | **4%** | **3%** | **1350** | **1** | **2** | **0** | **1347** |
| A12A | CALCIUM | € 489,740,841 | € 482,073,786 | € 486,964,993 | € 486,259,873 | 135,749,401 | 137,966,246 | 142,274,996 | 138,663,548 | 2% | -1% | 0% | 0% | 2% | 2% | 2% | 2% | 541 | 0 | 0 | 0 | 541 |
| A12B | POTASSIUM | € 89,780,718 | € 88,589,475 | € 88,944,386 | € 89,104,860 | 153,789,248 | 147,139,107 | 143,440,104 | 148,122,820 | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 99 | 0 | 0 | 0 | 99 |
| A12C | OTHER MINERAL SUPPLEMENTS | € 481,204,648 | € 424,954,381 | € 411,357,848 | € 439,172,292 | 133,947,877 | 124,460,576 | 121,287,152 | 126,565,202 | 13% | 3% | 8% | 5% | 1% | 1% | 1% | 1% | 710 | 1 | 2 | 0 | 707 |
| **A13** | **TONICS** | **€ 95,350,828** | **€ 86,793,262** | **€ 96,955,136** | **€ 93,033,075** | **20,086,122** | **20,201,222** | **23,708,562** | **21,331,969** | **10%** | **-10%** | **0%** | **-1%** | **0%** | **0%** | **0%** | **0%** | **465** | **5** | **1** | **0** | **459** |
| A13A | TONICS | € 95,350,828 | € 86,793,262 | € 96,955,136 | € 93,033,075 | 20,086,122 | 20,201,222 | 23,708,562 | 21,331,969 | 10% | -10% | 0% | -1% | 0% | 0% | 0% | 0% | 465 | 5 | 1 | 0 | 459 |
| **A14** | **ANABOLICS, SYSTEMIC** | **€ 3,355,589** | **€ 4,010,003** | **€ 4,062,599** | **€ 3,809,397** | **668,485** | **876,160** | **865,419** | **803,355** | **-16%** | **-1%** | **-9%** | **-6%** | **0%** | **0%** | **0%** | **0%** | **27** | **7** | **15** | **0** | **5** |
| A14A | ANABOLIC HORMONES, SYST | € 1,098,387 | € 1,648,971 | € 1,694,573 | € 1,480,644 | 411,952 | 598,854 | 573,195 | 528,000 | -33% | -3% | -18% | -13% | 0% | 0% | 0% | 0% | 21 | 6 | 15 | 0 | 0 |
| A14B | OTHER ANABOLIC AGENTS | € 2,257,202 | € 2,361,032 | € 2,368,026 | € 2,328,753 | 256,533 | 277,306 | 292,224 | 275,354 | -4% | 0% | -2% | -2% | 0% | 0% | 0% | 0% | 6 | 1 | 0 | 0 | 5 |
| **A15** | **APPETITE STIMULANTS** | **€ 4,826,873** | **€ 4,585,192** | **€ 4,578,637** | **€ 4,663,567** | **2,116,779** | **2,361,322** | **2,579,617** | **2,352,573** | **5%** | **0%** | **3%** | **2%** | **0%** | **0%** | **0%** | **0%** | **44** | **8** | **2** | **0** | **34** |
| A15A | APPETITE STIMULANTS | € 4,826,873 | € 4,585,192 | € 4,578,637 | € 4,663,567 | 2,116,779 | 2,361,322 | 2,579,617 | 2,352,573 | 5% | 0% | 3% | 2% | 0% | 0% | 0% | 0% | 44 | 8 | 2 | 0 | 34 |
| **A16** | **OTHER ALIMENTARY TRACT AND METABOLISM PRODUCTS** | **€ 2,632,566,036** | **€ 2,438,468,530** | **€ 2,373,498,868** | **€ 2,481,511,145** | **27,401,430** | **23,997,809** | **23,879,020** | **25,092,753** | **8%** | **3%** | **5%** | **4%** | **8%** | **8%** | **9%** | **8%** | **204** | **65** | **88** | **0** | **51** |
| A16A | OTHER METABOLIC PRODUCTS | € 2,632,566,036 | € 2,438,468,530 | € 2,373,498,868 | € 2,481,511,145 | 27,401,430 | 23,997,809 | 23,879,020 | 25,092,753 | 8% | 3% | 5% | 4% | 8% | 8% | 9% | 8% | 204 | 65 | 88 | 0 | 51 |
| | **TOTAL ALIMENTARY TRACT AND METABOLISM** | **€ 32,613,724,928** | **€ 29,127,395,655** | **€ 27,751,186,510** | **€ 29,830,769,031** | **5,806,554,315** | **5,650,759,917** | **5,637,057,933** | **5,698,124,055** | **12%** | **5%** | **8%** | **6%** | **100%** | **100%** | **100%** | **100%** | **12917** | **863** | **3198** | **12** | **8844** |

**Table 5: Alimentary tract and Metabolism**

| J: GENERAL ANTI-INFECTIVES SYSTEMIC | | | | | | | | | | Growth Rate | | | | Market Share | | | | Product Count | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Therapeutic Category | | Revenue MAT 2022 Q3 | Revenue MAT 2021 Q3 | Revenue MAT 2020 Q3 | Average Revenue (Of three years) | Units MAT 2022 Q3 | Units MAT 2021 Q3 | Units MAT 2020 Q3 | Average Units (Of three years) | YoY GR1 | YoY GR2 | AAGR | CAGR | MS 2022 | MS 2021 | MS 2020 | Average MS | Total Count of Products | Count of Non-Generic Products | Count of Generic Products | Count of Biosimilar Products | Other Category Products |
| **J1** | **SYSTEMIC ANTIBACTERIALS** | **€ 6,009,049,683** | **€ 5,486,942,278** | **€ 5,735,912,589** | **€ 5,743,968,183** | **1,468,510,274** | **1,374,448,545** | **1,502,499,389** | **1,448,486,069** | **10%** | **-4%** | **3%** | **2%** | **22%** | **23%** | **23%** | **23%** | **3,787** | **350** | **3,393** | **0** | **44** |
| J1A | TETRACYCLINES & COMBS | € 108,970,517 | € 112,106,057 | € 105,433,131 | € 108,836,568 | 41,995,509 | 40,633,972 | 43,530,492 | 42,053,324 | -3% | 6% | 2% | 1% | 0% | 0% | 0% | 0% | 186 | 21 | 165 | 0 | 0 |
| J1B | CHLORAMPHENICOLS + COMBS | € 8,289,689 | € 7,092,170 | € 7,632,631 | € 7,671,497 | 5,045,456 | 5,263,289 | 5,808,289 | 5,372,345 | 17% | -7% | 5% | 3% | 0% | 0% | 0% | 0% | 32 | 1 | 31 | 0 | 0 |
| J1C | BROAD SPECTR.PENICILLINS | € 1,615,620,687 | € 1,357,926,068 | € 1,513,944,288 | € 1,495,830,348 | 512,184,837 | 422,663,393 | 479,127,501 | 471,325,244 | 19% | -10% | 4% | 2% | 6% | 6% | 6% | 6% | 466 | 37 | 427 | 0 | 2 |
| J1D | CEPHALOSPORINS & COMBS | € 1,305,954,247 | € 1,138,284,818 | € 1,200,133,968 | € 1,214,791,011 | 387,194,178 | 386,766,717 | 433,403,508 | 402,454,801 | 15% | -5% | 5% | 3% | 5% | 5% | 5% | 5% | 862 | 104 | 755 | 0 | 3 |
| J1E | TRIMETHOPRIM COMBS | € 62,583,712 | € 57,654,020 | € 55,868,421 | € 58,702,051 | 36,931,682 | 35,190,586 | 36,992,197 | 36,371,488 | 9% | 3% | 6% | 4% | 0% | 0% | 0% | 0% | 80 | 11 | 69 | 0 | 0 |
| J1F | MACROLIDES & SIMILR TYPE | € 585,800,301 | € 524,143,971 | € 583,171,320 | € 564,371,864 | 176,711,234 | 166,647,925 | 176,181,079 | 173,180,079 | 12% | -10% | 1% | 0% | 2% | 2% | 2% | 2% | 586 | 37 | 548 | 0 | 1 |
| J1G | FLUORO-QUINOLONES | € 463,955,536 | € 485,460,965 | € 460,447,261 | € 469,954,587 | 125,902,923 | 139,206,156 | 135,271,509 | 133,460,196 | -4% | 5% | 1% | 0% | 2% | 2% | 2% | 2% | 646 | 39 | 585 | 0 | 22 |
| J1H | MED/NARROW SPECT PENICIL | € 187,807,688 | € 168,963,181 | € 196,766,238 | € 184,512,369 | 54,580,631 | 46,702,336 | 55,562,997 | 52,281,988 | 11% | -14% | -1% | -2% | 1% | 1% | 1% | 1% | 215 | 22 | 193 | 0 | 0 |
| J1K | AMINOGLYCOSIDES | € 155,722,565 | € 153,891,480 | € 168,183,683 | € 159,265,909 | 18,859,614 | 21,206,894 | 29,560,980 | 23,209,163 | 1% | -8% | -4% | -3% | 1% | 1% | 1% | 1% | 191 | 32 | 150 | 0 | 9 |
| J1L | CARBENICILLIN+SIMIL.TYPE | € 17,872,227 | € 18,855,796 | € 20,305,370 | € 19,011,131 | 619,370 | 678,867 | 712,510 | 670,249 | -5% | -7% | -6% | -4% | 0% | 0% | 0% | 0% | 3 | 1 | 2 | 0 | 0 |
| J1M | RIFAMPICIN AND RIFAMYCIN | € 9,864,975 | € 9,573,211 | € 10,729,187 | € 10,055,791 | 9,241,740 | 9,389,589 | 9,942,840 | 9,524,723 | 3% | -11% | -4% | -3% | 0% | 0% | 0% | 0% | 23 | 5 | 18 | 0 | 0 |
| J1P | OTH B-LACTAM EX PEN,CEPH | € 547,180,681 | € 559,336,538 | € 521,147,347 | € 542,554,855 | 44,123,730 | 44,885,858 | 41,692,085 | 43,567,224 | -2% | 7% | 3% | 2% | 2% | 2% | 2% | 2% | 174 | 12 | 161 | 0 | 1 |
| J1X | OTHER ANTIBACTERIALS | € 939,426,858 | € 893,654,003 | € 892,149,744 | € 908,410,202 | 55,119,370 | 55,212,963 | 54,713,402 | 55,015,245 | 5% | 0% | 3% | 2% | 3% | 4% | 4% | 4% | 323 | 28 | 289 | 0 | 6 |
| **J2** | **SYST ANTIFUNGAL AGENTS** | **€ 1,435,355,208** | **€ 1,415,150,589** | **€ 1,389,764,388** | **€ 1,413,423,395** | **95,303,935** | **91,316,573** | **92,838,634** | **93,153,047** | **1%** | **2%** | **2%** | **1%** | **5%** | **6%** | **6%** | **6%** | **685** | **31** | **640** | **0** | **14** |
| J2A | SYST ANTIFUNGAL AGENTS | € 1,435,355,208 | € 1,415,150,589 | € 1,389,764,388 | € 1,413,423,395 | 95,303,935 | 91,316,573 | 92,838,634 | 93,153,047 | 1% | 2% | 2% | 1% | 5% | 6% | 6% | 6% | 685 | 31 | 640 | 0 | 14 |
| **J3** | **SYSTEMIC SULPHONAMIDES** | **€ 1,326,062** | **€ 1,485,245** | **€ 1,661,126** | **€ 1,490,811** | **2,586,380** | **2,744,312** | **3,823,468** | **3,051,387** | **-11%** | **-11%** | **-11%** | **-7%** | **0%** | **0%** | **0%** | **0%** | **24** | **4** | **20** | **0** | **0** |
| J3A | SYSTEMIC SULPHONAMIDES | € 1,326,062 | € 1,485,245 | € 1,661,126 | € 1,490,811 | 2,586,380 | 2,744,312 | 3,823,468 | 3,051,387 | -11% | -11% | -11% | -7% | 0% | 0% | 0% | 0% | 24 | 4 | 20 | 0 | 0 |
| **J4** | **ANTIMYCOBACTERIALS** | **€ 116,092,047** | **€ 109,881,563** | **€ 115,141,646** | **€ 113,705,085** | **14,861,768** | **16,345,074** | **18,784,632** | **16,663,825** | **6%** | **-5%** | **1%** | **0%** | **0%** | **0%** | **0%** | **0%** | **265** | **74** | **180** | **0** | **11** |
| J4A | ANTITUBERCULAR PRODUCTS | € 113,495,776 | € 106,565,451 | € 110,090,354 | € 110,050,527 | 14,417,790 | 15,901,722 | 18,297,078 | 16,205,530 | 7% | -3% | 2% | 1% | 0% | 0% | 0% | 0% | 237 | 65 | 161 | 0 | 11 |
| J4B | TREATMENT OF LEPRA | € 2,596,271 | € 3,316,112 | € 5,051,292 | € 3,654,558 | 443,978 | 443,352 | 487,554 | 458,295 | -22% | -34% | -28% | -20% | 0% | 0% | 0% | 0% | 28 | 9 | 19 | 0 | 0 |
| **J5** | **ANTIVIRALS SYSTEMIC USE** | **€ 10,597,161,385** | **€ 9,489,327,539** | **€ 10,043,894,671** | **€ 10,043,461,198** | **382,504,399** | **345,535,462** | **356,220,768** | **361,420,210** | **12%** | **-6%** | **3%** | **2%** | **39%** | **39%** | **40%** | **39%** | **1,017** | **156** | **842** | **0** | **19** |
| J5B | ANTIVIRALS, OTHER | € 2,096,847,283 | € 1,346,851,366 | € 927,312,732 | € 1,457,003,794 | 189,430,467 | 153,366,023 | 133,522,582 | 158,773,024 | 56% | 45% | 50% | 31% | 8% | 6% | 4% | 6% | 434 | 58 | 362 | 0 | 14 |
| J5C | HIV ANTIVIRALS | € 6,033,511,025 | € 5,662,343,446 | € 5,954,929,274 | € 5,883,594,582 | 173,948,963 | 173,355,604 | 201,786,742 | 183,030,436 | 7% | -5% | 1% | 0% | 22% | 23% | 24% | 23% | 439 | 61 | 374 | 0 | 4 |
| J5D | HEPATITIS ANTIVIRALS | € 2,466,803,077 | € 2,480,132,727 | € 3,161,652,665 | € 2,702,862,823 | 19,124,969 | 18,813,835 | 20,911,444 | 19,616,749 | -1% | -22% | -11% | -8% | 9% | 10% | 13% | 11% | 144 | 37 | 106 | 0 | 1 |
| **J6** | **SERA & GAMMAGLOBULIN** | **€ 3,588,158,731** | **€ 3,042,161,636** | **€ 3,041,402,488** | **€ 3,223,907,618** | **9,780,496** | **9,387,128** | **9,875,693** | **9,681,106** | **18%** | **0%** | **9%** | **6%** | **13%** | **13%** | **12%** | **13%** | **180** | **0** | **0** | **0** | **180** |
| J6A | ANTITOXIC SERA | € 4,719,676 | € 2,792,644 | € 1,719,235 | € 3,077,185 | 57,291 | 60,741 | 68,638 | 62,223 | 69% | 62% | 66% | 40% | 0% | 0% | 0% | 0% | 35 | 0 | 0 | 0 | 35 |
| J6C | POLYVAL IMMUNO-GLOBL I.V | € 2,562,991,832 | € 2,204,755,091 | € 2,187,481,748 | € 2,318,409,557 | 4,625,855 | 4,519,445 | 4,622,716 | 4,589,339 | 16% | 1% | 9% | 5% | 9% | 9% | 9% | 9% | 40 | 0 | 0 | 0 | 40 |
| J6D | HOMOLOG IMM-ACTV GLB I.V | € 14,071,514 | € 18,536,896 | € 15,423,357 | € 16,010,589 | 84,618 | 131,701 | 110,913 | 109,077 | -24% | 20% | -2% | -3% | 0% | 0% | 0% | 0% | 4 | 0 | 0 | 0 | 4 |
| J6E | POLYVAL IMMUNO-GLOBL I.M | € 576,484,327 | € 477,166,642 | € 471,790,118 | € 508,480,362 | 1,925,488 | 1,835,649 | 2,068,631 | 1,943,256 | 21% | 1% | 11% | 7% | 2% | 2% | 2% | 2% | 7 | 0 | 0 | 0 | 7 |
| J6F | POLV IMM-GLB COM MOD I.M | € 100,020 | € 104,501 | € 79,063 | € 94,528 | 2,130 | 2,315 | 1,668 | 2,038 | -4% | 32% | 14% | 8% | 0% | 0% | 0% | 0% | 3 | 0 | 0 | 0 | 3 |
| J6G | SPECF IMM-GLOB ANTI-BACT | € 18,159,590 | € 14,370,629 | € 13,831,490 | € 15,453,903 | 858,627 | 829,371 | 903,207 | 863,735 | 26% | 4% | 15% | 9% | 0% | 0% | 0% | 0% | 21 | 0 | 0 | 0 | 21 |
| J6H | SPECF IMM-GLOB ANTIVIRAL | € 353,696,679 | € 268,527,410 | € 292,953,732 | € 305,059,274 | 979,054 | 776,268 | 832,784 | 862,702 | 32% | -8% | 12% | 6% | 1% | 1% | 1% | 1% | 49 | 0 | 0 | 0 | 49 |
| J6J | OTH SPEC IMMUNOGLOBULINS | € 57,935,093 | € 55,907,823 | € 58,123,745 | € 57,322,220 | 1,247,433 | 1,231,638 | 1,267,136 | 1,248,736 | 4% | -4% | 0% | 0% | 0% | 0% | 0% | 0% | 21 | 0 | 0 | 0 | 21 |
| **J7** | **VACCINES** | **€ 5,554,067,531** | **€ 4,626,997,910** | **€ 4,536,445,509** | **€ 4,905,836,983** | **186,927,522** | **206,899,499** | **178,316,511** | **190,714,511** | **20%** | **2%** | **11%** | **7%** | **20%** | **19%** | **18%** | **19%** | **335** | **0** | **0** | **0** | **335** |
| J7B | COMBINATIONS OF VACCINES | € 898,365,184 | € 850,496,635 | € 939,836,179 | € 896,232,666 | 28,861,504 | 27,571,788 | 30,916,503 | 29,116,598 | 6% | -10% | -2% | -1% | 3% | 4% | 4% | 4% | 80 | 0 | 0 | 0 | 80 |
| J7D | BACTERIAL VACCINES | € 1,044,991,244 | € 1,152,482,182 | € 1,249,677,291 | € 1,149,050,239 | 24,071,562 | 28,506,858 | 28,828,535 | 27,135,652 | -9% | -8% | -9% | -6% | 4% | 5% | 5% | 5% | 96 | 0 | 0 | 0 | 96 |
| J7E | VIRAL VACCINES | € 3,512,347,226 | € 2,533,244,453 | € 2,241,228,522 | € 2,762,273,400 | 124,641,367 | 141,445,338 | 108,519,645 | 124,868,783 | 39% | 13% | 26% | 16% | 13% | 10% | 9% | 11% | 126 | 0 | 0 | 0 | 126 |
| J7X | ALL OTHER VACCINE-LIKE PRODUCTS | € 98,363,877 | € 90,774,640 | € 105,703,517 | € 98,280,678 | 9,353,089 | 9,375,515 | 10,051,828 | 9,593,477 | 8% | -14% | -3% | -2% | 0% | 0% | 0% | 0% | 33 | 0 | 0 | 0 | 33 |
| **J8** | **OTHER ANTI-INFECTIVES** | **€ 71,569,371** | **€ 64,379,665** | **€ 68,634,462** | **€ 68,194,499** | **38,936,413** | **42,625,153** | **51,334,957** | **44,298,841** | **11%** | **-6%** | **2%** | **1%** | **0%** | **0%** | **0%** | **0%** | **94** | **10** | **77** | **0** | **7** |
| J8B | ANAEROBICIDES | € 60,862,668 | € 56,831,201 | € 59,554,166 | € 59,082,678 | 37,763,066 | 41,535,346 | 50,223,741 | 43,174,051 | 7% | -5% | 1% | 1% | 0% | 0% | 0% | 0% | 84 | 7 | 77 | 0 | 0 |
| J8X | ALL OTH ANTI-INFECTIVES | € 10,706,703 | € 7,548,464 | € 9,080,296 | € 9,111,821 | 1,173,347 | 1,089,807 | 1,111,216 | 1,124,790 | 42% | -17% | 12% | 6% | 0% | 0% | 0% | 0% | 10 | 3 | 0 | 0 | 7 |
| **TOTAL ANTI-INFECTIVES** | | **€ 27,372,780,018** | **€ 24,236,326,425** | **€ 24,932,856,879** | **€ 25,513,987,774** | **2,199,411,187** | **2,089,301,746** | **2,213,694,052** | **2,167,468,995** | **13%** | **-3%** | **5%** | **3%** | **100%** | **100%** | **100%** | **100%** | **6,387** | **625** | **5,152** | **0** | **610** |

**Table 6: General Anti-Infectives Systemic**

| B: Blood and blood forming organs | | | | | | | | | | Growth Rate | | | | Market Share | | | | Product Count | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Therapeutic Category | Revenue MAT 2022 Q3 | Revenue MAT 2021 Q3 | Revenue MAT 2020 Q3 | Average Revenue (Of three years) | Units MAT 2022 Q3 | Units MAT 2021 Q3 | Units MAT 2020 Q3 | Average Units (Of three years) | YoY GR1 | YoY GR2 | AAGR | CAGR | MS 2022 | MS 2021 | MS 2020 | Average MS | Total Count of Products | Count of Non-Generic Products | Count of Generic Products | Count of Biosimilar Products | Other Category Products |
| **B1** | **ANTITHROMBOTIC AGENTS** | **€ 14,186,270,938** | **€ 13,225,730,987** | **€ 12,143,168,161** | **€ 13,185,056,695** | **1,218,090,734** | **1,211,491,746** | **1,183,814,654** | **1,204,465,711** | **7%** | **9%** | **8%** | **5%** | **60%** | **61%** | **61%** | **61%** | **914** | **110** | **774** | **18** | **12** |
| B1A | VITAMIN K ANTAGONISTS | € 91,590,485 | € 103,244,523 | € 119,977,976 | € 104,937,661 | 56,681,522 | 62,944,223 | 76,418,140 | 65,347,962 | -11% | -14% | -13% | -9% | 0% | 0% | 1% | 0% | 69 | 15 | 52 | 0 | 2 |
| B1B | HEPARINS | € 2,606,277,719 | € 2,675,496,231 | € 2,350,761,584 | € 2,544,178,511 | 258,599,489 | 270,379,160 | 252,102,208 | 260,360,286 | -3% | 14% | 6% | 3% | 11% | 12% | 12% | 12% | 146 | 21 | 104 | 18 | 3 |
| B1C | PLATELET AGGR.INHIBITORS | € 1,818,722,485 | € 1,778,890,340 | € 1,864,016,369 | € 1,820,543,065 | 643,915,678 | 651,319,297 | 646,476,646 | 647,237,207 | 2% | -5% | -1% | -1% | 8% | 8% | 9% | 8% | 609 | 45 | 560 | 0 | 4 |
| B1D | FIBRINOLYTICS | € 278,105,444 | € 277,583,713 | € 290,827,033 | € 282,172,063 | 1,492,521 | 1,579,462 | 1,652,640 | 1,574,874 | 0% | -5% | -2% | -1% | 1% | 1% | 1% | 1% | 31 | 9 | 22 | 0 | 0 |
| B1E | DIRECT THROMBIN INHIBIT. | € 832,715,936 | € 843,654,812 | € 877,385,025 | € 851,251,924 | 23,595,656 | 23,633,783 | 25,170,043 | 24,133,161 | -1% | -4% | -3% | -2% | 4% | 4% | 4% | 4% | 15 | 9 | 6 | 0 | 0 |
| B1F | DIRECT FACTOR XA INHIBS | € 8,338,427,127 | € 7,367,744,149 | € 6,486,840,902 | € 7,397,670,726 | 227,382,078 | 195,477,497 | 176,256,855 | 199,705,477 | 13% | 14% | 13% | 9% | 35% | 34% | 33% | 34% | 30 | 5 | 24 | 0 | 1 |
| B1X | OTH.ANTITHROMBOTIC AGENT | € 220,431,742 | € 179,117,219 | € 153,359,272 | € 184,302,744 | 6,423,790 | 6,158,324 | 5,738,122 | 6,106,745 | 23% | 17% | 20% | 13% | 1% | 1% | 1% | 1% | 14 | 6 | 6 | 0 | 2 |
| **B2** | **BLOOD COAG SYST OTH PROD** | **€ 5,611,895,245** | **€ 5,034,353,809** | **€ 4,466,196,112** | **€ 5,037,481,722** | **57,723,133** | **55,022,124** | **56,804,998** | **56,516,752** | **11%** | **13%** | **12%** | **8%** | **24%** | **23%** | **22%** | **23%** | **410** | **69** | **149** | **0** | **192** |
| B2A | ANTI-FIBRINOLYTICS | € 65,384,039 | € 59,566,803 | € 55,989,417 | € 60,313,420 | 23,762,479 | 21,317,102 | 21,179,488 | 22,086,356 | 10% | 6% | 8% | 5% | 0% | 0% | 0% | 0% | 97 | 3 | 80 | 0 | 14 |
| B2B | ANTAGONISTS | € 86,628,605 | € 65,312,177 | € 56,711,143 | € 69,550,642 | 13,813,990 | 14,160,759 | 15,534,255 | 14,503,001 | 33% | 15% | 24% | 15% | 0% | 0% | 0% | 0% | 68 | 8 | 22 | 0 | 38 |
| B2C | PROTEINASE INHIBITORS | € 84,465,906 | € 94,806,235 | € 89,384,632 | € 89,552,258 | 710,792 | 759,914 | 834,593 | 768,433 | -11% | 6% | -2% | -2% | 0% | 0% | 0% | 0% | 24 | 2 | 10 | 0 | 12 |
| B2D | BLOOD COAGULATION PRODUCTS | € 4,214,654,924 | € 3,770,888,771 | € 3,302,101,949 | € 3,762,548,548 | 7,745,168 | 7,719,224 | 7,436,420 | 7,633,604 | 12% | 14% | 13% | 8% | 18% | 17% | 17% | 17% | 108 | 37 | 10 | 0 | 61 |
| B2E | THROMBOPOIETIN AGONISTS | € 828,489,464 | € 722,813,769 | € 643,659,100 | € 731,654,111 | 3,695,329 | 3,239,717 | 2,771,951 | 3,235,666 | 15% | 12% | 13% | 9% | 4% | 3% | 3% | 3% | 8 | 5 | 1 | 0 | 2 |
| B2F | TISSUE SEALING PREPS | € 265,953,827 | € 255,309,731 | € 250,710,798 | € 257,324,785 | 1,523,737 | 1,470,941 | 1,430,107 | 1,474,928 | 4% | 2% | 3% | 2% | 1% | 1% | 1% | 1% | 25 | 7 | 1 | 0 | 17 |
| B2G | SYSTEMIC HAEMOSTATICS | € 66,318,480 | € 65,656,323 | € 67,639,073 | € 66,537,959 | 6,471,638 | 6,354,467 | 7,618,184 | 6,814,763 | 1% | -3% | -1% | -1% | 0% | 0% | 0% | 0% | 80 | 7 | 25 | 0 | 48 |
| **B3** | **ANTIANEMICS** | **€ 3,299,334,566** | **€ 3,052,001,662** | **€ 2,945,030,294** | **€ 3,098,788,841** | **309,125,771** | **292,182,479** | **283,606,864** | **294,971,705** | **8%** | **4%** | **6%** | **4%** | **14%** | **14%** | **15%** | **14%** | **743** | **42** | **19** | **5** | **677** |
| B3A | HAEMATINICS.IRON & COMBS | € 1,148,364,849 | € 1,013,873,127 | € 922,344,322 | € 1,028,194,099 | 171,980,247 | 161,749,205 | 156,849,697 | 163,526,383 | 13% | 10% | 12% | 8% | 5% | 5% | 5% | 5% | 483 | 12 | 7 | 0 | 464 |
| B3B | LIVER & COMBS WITH B12 | € 190,878 | € 189,988 | € 186,323 | € 189,063 | 17,425 | 17,896 | 19,804 | 18,375 | 0% | 2% | 1% | 1% | 0% | 0% | 0% | 0% | 2 | 1 | 0 | 0 | 1 |
| B3C | ERYTHROPOIETIN PRODUCTS | € 1,926,558,655 | € 1,862,766,439 | € 1,877,768,255 | € 1,889,031,116 | 21,776,668 | 21,626,137 | 22,201,704 | 21,868,170 | 3% | -1% | 1% | 1% | 8% | 9% | 9% | 9% | 28 | 16 | 7 | 5 | 0 |
| B3D | HIF-PH INHIBITORS | € 1,981,484 | € 2,496 | | € 991,990 | 7,490 | 8 | 0 | 2,499 | 79286% | #DIV/0! | #DIV/0! | #DIV/0! | 0% | 0% | 0% | 0% | 1 | 1 | 0 | 0 | 0 |
| B3X | OTH ANTI-ANAE+FOLIC ACID | € 222,238,700 | € 175,169,612 | € 144,731,394 | € 180,713,235 | 115,343,941 | 108,789,233 | 104,535,659 | 109,556,278 | 27% | 21% | 24% | 15% | 1% | 1% | 1% | 1% | 229 | 12 | 5 | 0 | 212 |
| **B6** | **ALL OTH HAEMATOLOG AGENT** | **€ 540,451,640** | **€ 389,752,639** | **€ 298,289,073** | **€ 409,497,784** | **925,195** | **712,665** | **635,840** | **757,900** | **39%** | **31%** | **35%** | **22%** | **2%** | **2%** | **2%** | **2%** | **53** | **14** | **24** | **0** | **15** |
| B6B | HYALURONIDASE | € 2,251,053 | € 2,179,424 | € 1,713,243 | € 2,047,907 | 172,903 | 174,277 | 144,045 | 163,742 | 3% | 27% | 15% | 10% | 0% | 0% | 0% | 0% | 10 | 0 | 0 | 0 | 10 |
| B6D | HEREDITARY ANGIOEDEMA PRODUCTS | € 433,029,055 | € 334,570,367 | € 273,799,799 | € 347,133,074 | 262,192 | 231,964 | 224,597 | 239,584 | 29% | 22% | 26% | 17% | 2% | 2% | 1% | 2% | 29 | 7 | 22 | 0 | 0 |
| B6X | OTHER HAEMATOLOGICAL AGENTS | € 105,171,532 | € 53,002,848 | € 22,776,031 | € 60,316,804 | 490,100 | 306,424 | 267,198 | 354,574 | 98% | 133% | 116% | 67% | 0% | 0% | 0% | 0% | 14 | 7 | 2 | 0 | 5 |
| **TAL BLOOD AND BLOOD FORMING ORGA** | | **€ 23,637,952,389** | **€ 21,701,839,097** | **€ 19,852,683,640** | **€ 21,730,825,042** | **23,637,952,389** | **21,701,839,097** | **19,852,683,640** | **21,730,825,042** | **9%** | **9%** | **9%** | **6%** | **100%** | **100%** | **100%** | **100%** | **2,120** | **235** | **966** | **23** | **896** |

Table 7: Blood and Blood forming organs

# 6. KEY FINDINGS AND RECOMMENDATIONS

*Based on the analysis and tabulations, some of the major findings are as follows:*

It appears that the top therapeutic categories in terms of revenue and units sold are focused on treating chronic diseases, such as cancer, cardiovascular disease, and neurological disorders.

A significant therapeutic category found in both high revenue and high unit sales is Alimentary Tract and Metabolism. Likely due to digestive system disorders and metabolic issues experienced by numerous individuals. The most profitable class was Antineoplastic and immunomodulating agents generating €75 billion despite only selling 1 billion units, such drugs are specialized requiring costly procedures yet extending a critical role treating cancer patients.

A large number of units on sale occurred under Nervous system therapeutic division amounting to eight billion indicating an increased patient base affected by one or more neurological impairments.

Alimentary tract and metabolism had the highest average number of units sold per year (6 billion), which could indicate a high incidence of digestive and metabolic disorders.

Hospital solutions generated a relatively small amount of revenue (€3 bn) but had a relatively high number of units sold (2 billion). This could indicate that these are lower priced products that are used frequently in hospital setting.

The revenue for the respiratory system therapeutic category increased significantly from MAT 2020 Q3 to MAT 2021 Q3, likely due to the COVID-19 pandemic and the increased demand for respiratory drugs.

The dermatologicals therapeutic category had a relatively stable revenue over the past three years, but the average number of units sold decreased

from MAT 2020 Q3 to MAT 2021 Q3. This could suggest that there may be fewer patients seeking treatment for dermatological conditions.

## 7. LIMITATIONS OF THE STUDY

The data was provided by Blue Berry Pharma Advisory which is a pharma advisory firm based in Mumbai. The report was generated based on the IQVIA's MIDAS Data which is a property of Blue Berry Pharma Advisory. All the analysis is as per the current market trends of Europe. Other sources like academic journals, articles, open source databases etc were used to generate this report.

Due to ongoing war in Ukraine, the data of Ukraine was not available. Out of 35 countries, the database only had the information of 33 countries. Another missing country was Denmark.

## 8. APPENDIX

1. EMA – European Medical Agency
2. EphMRA - European Pharmaceutical Market Research Association
3. ATC - Anatomical Therapeutic Chemical
4. NFC – New Form Code
5. MIDAS - Market Information and Data Analysis System
6. MAT – Moving Annual Total
7. CAGR – Compound Annual Growth Rate
8. AAGR – Average Annual Growth Rate
9. YoY – Year Over Year
10. GR - Growth Rate
11. Q3 – Third Quarter
12. Bn. – Billion
13. Mn. – Million

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