

Summary

- Global Pharmaceutical market grew 2% in 2013 although Developed and Emerging Markets played a very different role
 - While EM delivered 30 bn USD of additional revenues, DM reduced sales more than 8 bn USD
 - Within Developed Markets, EU dropped 16 bn USD (-7%) versus 2012 while USA, Canada, Japan and other APAC developed markets grew at an average of 2%
 - In Emerging Markets, BRIC contributed more than 80% to growth, meaning 25 bn USD, while rest of Pharmerging represented nearly 5 additional billion
- Top 12 Pharmaceutical Companies represent 39% of Global Pharmaceutical Market in 2013 with much stronger position in Developed Markets (42,5%) than in Emerging Markets (27%)
- In 2013 MS of Top 12 declined in both market segments, but while in DM decrease was 0,8%, in EM nearly doubled (-1,5%)
- While more than 80% of Market Growth is delivered by Emerging Markets, Big Pharma is strongly losing MS on this Market Segment