



IMS Market Prognosis

The authority in predicting future pharmaceutical market trends

IMS Market Prognosis: a track record of country market forecasts

IMS Market Prognosis is a strategic market forecasting publication that provides unparalleled insights into the economic and political issues affecting the local pharmaceutical and healthcare industries.

Based on a rigorous evaluation of the key events affecting the marketplace, IMS Market Prognosis provides a 5-year forecast at country, regional and global level. IMS Market Prognosis enables better-informed strategic decisions.

Each report contains in-depth business, political, economic and healthcare analysis

Whether your focus is local, regional, or global, IMS Market Prognosis offers a robust forecast. The forecasts support detailed explanation of your business, both political and economic, and healthcare, including cost containment, prescribing and reimbursement, pricing trends, regulatory and pharmaceutical environment.

BUSINESS ENVIRONMENT

Highlighting the issues affecting a country's ability to attract, develop and sustain investment or leverage national resources to grow the economy in the global marketplace

- Economic and political trends
- Population dynamics
- Macroeconomic indicators for the country's future growth

HEALTHCARE ENVIRONMENT

Providing unparalleled insights into areas of opportunity and future growth

- Local industry expert opinion
- Local healthcare systems and infrastructure
- Cost containment initiatives and regulatory practices
- Sales trends for key players, leading therapies and products

TIMELY, RELEVANT, ACTIONABLE MARKET INTELLIGENCE

Latest information to feed into strategic and annual plans

- Release schedule synchronised with annual pharmaceutical strategic cycle
- 6 month update allows adjustment strategy to cope with market changes
- Significant cost savings in market intelligence information

DETAILED COUNTRY-LEVEL EVENTS

Transparent explanation of market drivers

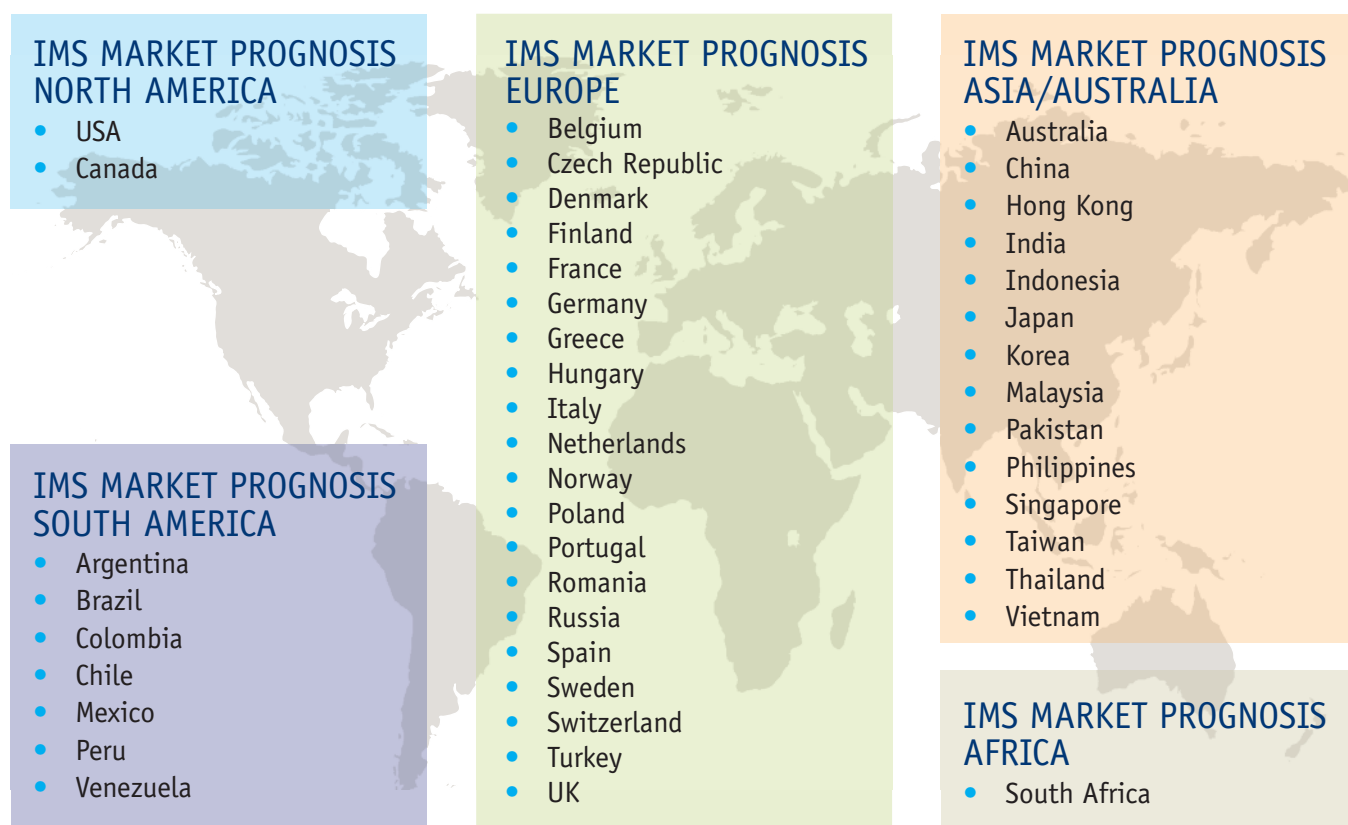
- Time, date and probability for each event impact
- Separate assessment for volume and price
- Individual retail and hospital evaluations

Comprehensive country, regional & global focus

IMS Market Prognosis provides a global pharmaceutical market forecasts with 44 in-depth and over 220 top line country forecasts in 11 regions worldwide:

- Africa
- Commonwealth of Independent States (CIS)
- Europe – EU Members
- Europe – non EU members
- Indian subcontinent
- Japan
- Latin America & Caribbean
- Middle East
- North America
- Oceania
- South East Asia & China

Comprehensive country, regional & global focus



In formats to suit your business needs

- **Country reports**
Available individually: PDF or Online (via IMS Customer Portal: www.imsportal.com)
- **Country forecast summary**
All 44 in-depth Market Prognosis segment forecasts: Excel
- **Regional Summaries**
Europe, N. America, Asia Australia, Latin America, Pharmerging, Core Countries (EU5, N. America, Switzerland, China): PowerPoint (PDF)
- **Global forecast summary**
220+ top-line Market Prognosis Global forecasts: Excel

Confidence through proven and transparent methodology

IMS Market Prognosis combines historical data and macroeconomic indicators with the identification and evaluation of key future issues.

CREATING THE BASELINE – QUANTITATIVE PROJECTION

Initial baseline projections combine IMS market information with in-depth macroeconomic indicators to feed into IMS's proven econometric model.

- 40 quarters of historical data by sector
- Estimates of unaudited market sectors
- 5 main macroeconomic indicators based on historical information

REFINE THE BASELINE – IDENTIFY, EVALUATE & QUANTIFY EVENTS

The baseline is refined and adjusted with IMS expertise and insight within each country. This is supplemented with extensive primary and secondary research among all key stakeholders in the industry, including government representatives, regulatory authorities, key opinion leaders, specialists, physicians, pharmacists, pharmaceutical companies and wholesalers.

Events are based on:

- Legislative changes
- Pricing system changes, price cuts
- Reimbursement status changes
- Healthcare budget constraints/cuts
- Cost-containment measures
- Generic competition
- Major new product launches

THE “EVENTED” FORECAST

IMS Market Prognosis presents 5-year country forecasts for:

- Retail and hospital
- Price and volume
- Total market sales
- Generic versus Branded sales forecasts for 24 countries

Unparalleled insights for intelligent and effective decision-making

Let IMS Market Prognosis answer your business needs:

- **Validate** your own forecasts to establish annual targets
- **Set and manage expectations** from corporate headquarters to local subsidiaries
- **Evaluate** key economic and healthcare-related issues in each country
- **Identify** macro events shaping the pharmaceutical country markets
- **Understand** key drivers in the hospital and retail markets over the next 5 years for each country market
- **Apply** unrivalled world perspective on established and emerging markets to determine future investments

ACCURACY

Each year, IMS Market Prognosis reports are validated to a 1-year and 5-year forecast horizon. This unique practice assures sustained quality and ongoing improvement of our forecasting services.

PROVEN

Over 25 years of forecasting expertise supports IMS Market Prognosis.

COMPREHENSIVE

IMS Market Prognosis is the only series that covers 44 in-depth and over 220 top line country forecasts across 11 regions.

UP TO DATE

IMS Market Prognosis is released bi-annually, with forecasts and market overview updated in March and September, and a detailed commentary on the Political, Business and Healthcare environment updated annually.

CONSISTENT

All IMS Market Prognosis reports use established, consistent methodologies combined with extensive IMS Health market information and analysis.

INSIGHTFUL

A unique and comprehensive library of “events” enables marketing, R&D, and product teams to fully understand the key dynamics and major drivers that will impact the market.

TRANSPARENT

All reports provide a detailed explanation of every forecast. Every “event” is detailed and quantified. There is no “black box” methodology for any of our forecasts.

EXPERT

All forecasts are based on extensive primary and secondary research covering all key stakeholders in the industry and supplemented with additional intelligence from local IMS Health experts.

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IMS is present in over 100 markets, for our office locations, visit: www.imshealth.com/locations

ABOUT IMS

IMS Health is the leading provider of information services for the healthcare industry around the world. The company draws on its global technology infrastructure and unique combination of in-depth, sophisticated analytics, on-shore and off-shore commercial services, and consulting platforms to help clients better understand the performance and value of medicines. With a presence in 100+ countries and more than 55 years of industry experience, IMS Health serves leading decision makers in healthcare, including pharmaceutical manufacturers and distributors, providers, payers, government agencies, policymakers, researchers and the financial community. Additional information is available at <http://www.imshealth.com>