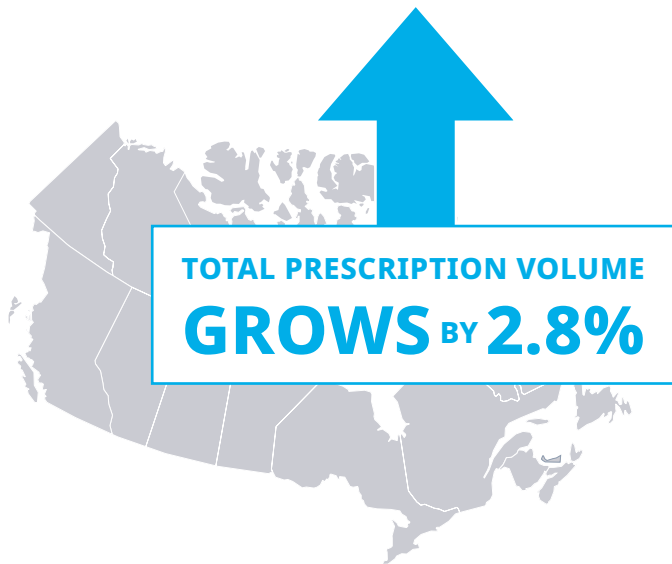


2023 Canadian Pharmaceutical Market Highlights



Source: IQVIA. Canadian CompuScript. MAT December 2023

Retail pharmacies dispensed

822.3

MILLION PRESCRIPTIONS

GENERICS SHARE

= 76.6% OF THE MARKET,
UP 2.3%

BRAND SHARE

= 23.4% OF THE MARKET,
DOWN 2.3%



Source: IQVIA. Canadian CompuScript. MAT December 2023

TOP 10 MOLECULES

by Total Ethical Prescriptions, 2023

RANK	PRODUCT	% CHANGE OVER 2022
1	ROSUVASTATIN	+7.5
2	PANTOPRAZOLE	+4.9
3	LEVOTHYROXINE	+1.0
4	AMLODIPINE	+4.9
5	ATORVASTATIN	+1.7
6	CHOLECALCIFEROL	+1.8
7	METFORMIN	+3.8
8	METHADONE	-13.1
9	ACETYLSALICYLIC ACID	-1.4
10	QUETIAPINE	+3.4

Source: IQVIA. Canadian CompuScript. MAT December 2023

2023 Canadian Pharmaceutical Market Highlights

COMBINED RETAIL AND HOSPITAL PURCHASES = \$43.04 BILLION UP 9.3%



BRAND GROWTH (+9.2%) GENERICS GROWTH (+9.6%)

Source: IQVIA. Canadian Drugstore and Hospital Audit. MAT December 2023

Leading Therapeutic Classes in Retail and Hospital Purchases, 2023

RANK	THERAPEUTIC CLASS	TOTAL PURCHASES (\$ MILLIONS)	% CHANGE OVER 2022
1	ONCOLOGY	\$6,691	+18.9 %
2	DIABETES THERAPY	\$4,183	+20.8 %
3	ANTIARTHRITICS	\$3,586	+2.3 %
4	IMMUNOLOGIC AGENTS	\$3,327	+14.7 %
5	PSYCHOTHERAPEUTICS	\$3,132	+9.8 %
6	RESPIRATORY THERAPY	\$1,996	+6.6%
7	CARDIOVASCULARS	\$1,676	+8.2 %
8	OPHTHALMICS	\$1,670	+9.2 %
9	NEUROLOGICAL DISORDERS	\$1,645	+12.6 %
10	ANTI-VIRALS	\$1,561	+5.2%

Source: IQVIA. Canadian Drugstore and Hospital Audit. MAT Dec 2023 DM

Retail Pharmacy Channels

Chains & Banners:

7,848

Food/Mass merchandisers:

1,660

Independents:

2,454



Source: IQVIA Territorial Sales Analysis outlet count MAT Dec 2023 DM