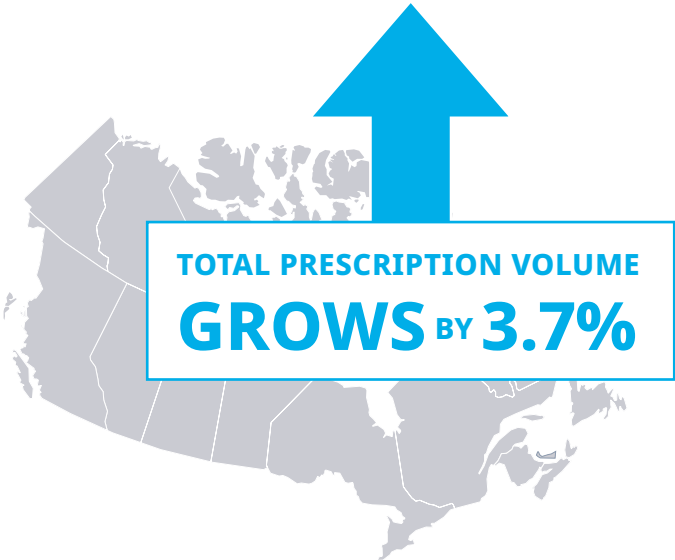


2024 Canadian Pharmaceutical Market Highlights



Source: IQVIA. Canadian CompuScript. MAT December 2024

Retail pharmacies dispensed

855.3

MILLION PRESCRIPTIONS

GENERICS SHARE

= 77.8% OF THE MARKET,
UP 5.73%

BRAND SHARE

= 22.2% OF THE MARKET,
DOWN 1.58%



Source: IQVIA. Canadian CompuScript. MAT December 2024

TOP 10 MOLECULES

by Total Ethical Prescriptions, 2024

RANK	PRODUCT	% CHANGE OVER 2023
1	ROSUVASTATIN	+9.5
2	PANTOPRAZOLE	+6.5
3	AMLODIPINE	+5.7
4	LEVOTHYROXINE	+0.7
5	ATORVASTATIN	+3.8
6	CHOLECALCIFEROL	+1.1
7	METFORMIN	+5.4
8	METHADONE	-6.6
9	ACETYLSALICYLIC ACID	-6.7
10	BISOPROLOL	+5.1

Source: IQVIA. Canadian CompuScript.
MAT December 2024

2024 Canadian Pharmaceutical Market Highlights

COMBINED RETAIL AND HOSPITAL PURCHASES

=

\$47.25 BILLION
UP 8%



BRAND GROWTH (+8%) GENERICS GROWTH (+7.9%)

Source: IQVIA. Canadian Drugstore and Hospital Audit. MAT December 2024

Leading Therapeutic Classes in Retail and Hospital Purchases, 2024

RANK	THERAPEUTIC CLASS	TOTAL PURCHASES (\$ MILLIONS)	% CHANGE OVER 2023
1	ONCOLOGY	\$7,981	+17%
2	DIABETES THERAPY	\$4,481	+7.2%
3	IMMUNOLOGIC AGENTS	\$4,153	+20.2%
4	ANTIARTHRITICS	\$3,697	+2.9%
5	PSYCHOTHERAPEUTICS	\$3,286	+5%
6	RESPIRATORY THERAPY	\$2,159	+8%
7	CARDIOVASCULARS	\$1,847	+9.9%
8	NEUROLOGICAL DISORDERS	\$1,821	+10.4%
9	OPHTHALMICS	\$1,781	+6.3%
10	ANTI-VIRALS	\$1,707	-10.5%

Source: IQVIA. Canadian Drugstore and Hospital Audit.
MAT Dec 2024 DM

Retail Pharmacy Channels

Chains & Banners:

7,843

Food/Mass merchandisers:

1,639

Independents:

2,531



Source: IQVIA Territorial Sales Analysis
outlet count MAT Dec 2024 DM