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U.S. Pharmaceuticals

UBS Large Cap Pharmaceuticals
Monthly Handbook

What's new? Issuing November edition of our large cap monthly
As a reminder, this publication consists of monthly therapeutic market models along with TRx growth trends and market share estimates for key products in all the categories within large cap pharmaceuticals. It also includes monthly promotion detail tables for all the included categories.

Our takeaways for October 2013 TRxs
Within diabetes, the DPP-IV sub-class grew with ~2.0% in October and in the GLP-1 sub-class Bydureon and Victoza gained share while Byetta continued to lose its market share. In MS, both PFE/MRK's Rebif and Teva's Copaxone continued to lose their market share. Lastly, in the anti-clotting market, Plavix's share continued to slide to ~1%.

New and Interesting
We have added no new market models this month.



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Table 95: Urology – US Overactive Bladder Promotion Details Monthly

| # of Details for Tot. Category ('000s) | 2011 | 2012 | Jan-13 | Feb-13 | Mar-13 | Apr-13 | May-13 | Jun-13 | Jul-13 | Aug-13 | Sep-13 | 2013 YTD |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Total Category | 1,073 | 1,075 | 84 | 73 | 80 | 78 | 80 | 65 | 69 | 85 | 79 | 692 |
| <i>Growth rate</i> | <i>-7.0%</i> | <i>0.2%</i> | <i>-0.4%</i> | <i>-20.0%</i> | <i>-9.8%</i> | <i>-12.6%</i> | <i>-28.5%</i> | <i>-17.7%</i> | <i>-23.1%</i> | <i>-9.3%</i> | <i>8.5%</i> | <i>-13.4%</i> |
| Market Share | 2011 | 2012 | Jan-13 | Feb-13 | Mar-13 | Apr-13 | May-13 | Jun-13 | Jul-13 | Aug-13 | Sep-13 | 2013 YTD |
| Sanctura XR - Allergan | 2.4% | 0.8% | 0.0% | 0.0% | 0.4% | 0.6% | 0.6% | 0.5% | 0.0% | 0.3% | 0.3% | 0.3% |
| Sanctura - Allergan | 1.1% | 0.8% | 0.9% | 0.6% | 0.4% | 0.4% | 0.2% | 1.0% | 0.9% | 0.6% | 0.2% | 0.6% |
| Vesicare - GlaxoSmithKline | 44.6% | 39.3% | 38.1% | 27.2% | 26.6% | 29.1% | 26.7% | 28.0% | 31.0% | 24.1% | 18.6% | 27.7% |
| Oxytrol - Actavis | 0.1% | 0.1% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.2% | 0.0% | 0.1% |
| Gelnique - Actavis | 8.1% | 6.4% | 2.3% | 5.2% | 4.4% | 2.3% | 3.2% | 2.7% | 1.7% | 1.2% | 1.4% | 2.7% |
| Enablex - Warner Chilcott | 13.4% | 9.0% | 8.6% | 6.7% | 6.6% | 6.4% | 7.2% | 7.2% | 6.1% | 8.5% | 9.9% | 7.5% |
| Detrol LA - Pfizer | 1.3% | 2.7% | 0.8% | 0.8% | 1.7% | 3.2% | 1.4% | 1.9% | 1.4% | 2.7% | 1.9% | 1.8% |
| Detrol - Pfizer | 0.2% | 0.2% | 0.0% | 0.0% | 0.0% | 0.3% | 0.7% | 0.6% | 0.2% | 0.5% | 0.0% | 0.2% |
| Toviaz - Pfizer | 28.6% | 35.3% | 19.9% | 23.0% | 21.1% | 14.9% | 17.7% | 24.6% | 22.2% | 15.6% | 21.4% | 19.9% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |

Source: IMS database