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NONPRESCRIPTION DRUGS CANADA 2002

Sixth Edition



An in-depth look at Canada's CN\$1.6 billion nonprescription drug industry. Profiles of major markets and OTC drug manufacturers include:

- Sales and market share of leading brands
- New product activity
- Major company sales and market share
- Five-year historical sales
- Impact of private-label products
- Retail distribution
- Regulatory activity
- Advertising and promotional activity
- Five-year forecasts



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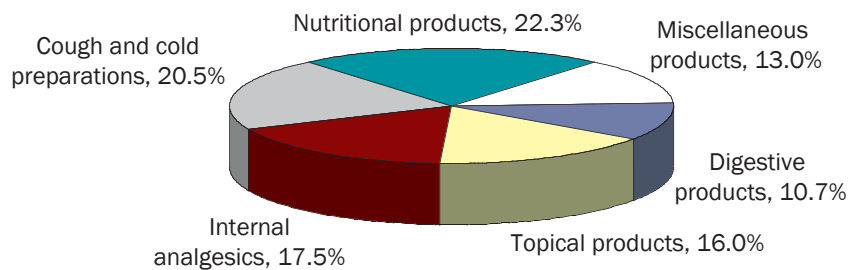
Kline & Company is pleased to announce the sixth edition of ***NONPRESCRIPTION DRUGS CANADA 2002***.

This study provides an in-depth analysis of Canada's CN\$1.6 billion self-medication industry. It follows five successful editions published by Kline since 1990.

The study is designed to take a comprehensive look at Canada's OTC market with details on product classes shown in Figure 1.

Figure 1

MANUFACTURERS' SALES OF NONPRESCRIPTION DRUGS



Total: CN\$1,604 Million

REPORT OUTLINE

1. INTRODUCTION

- Study overview

2. INDUSTRY ANALYSIS

- Overall market and trends
 - Market size
 - Market growth
 - Sales and distribution
 - Private-label activity
 - Industry outlook
- Competitive market structure
 - Companies and market share
 - Profitability
 - Outlook

3. PRODUCTS

Each profile includes:

- Category development
- Product description
- Historical sales
- Physical volume
- Retail value
- Regulatory status
- Competition
- Private-label activity
- Retail outlets
- Promotion
- Five-year outlook

4. MAJOR AND MINOR COMPANIES

Each major company profile includes:

- Company activities
- Corporate sales and profits

- Canadian operations
- Nonprescription drug sales

Each minor company profile includes:

- Company description
- Canadian operations
- Nonprescription drug sales

5. MARKET WATCH BULLETIN

- New products
- Company developments
 - Mergers and acquisitions, divestitures, joint ventures and licensing agreements, restructuring, company appointments, and other developments for 2001 and 2002
- Regulatory update
 - Background/administrative structure
 - National standards of pharmacy practice
 - Rx-to-OTC switches
 - International trade
 - Advertising and promotion
 - Labeling and packaging standards
 - Pharmacare - national drug plan
 - Cost recovery system
 - Office of Natural Health Products
 - Patents
 - Pricing
 - Health Canada realignment
 - Other regulatory issues

APPENDIX

- Pharmaceutical associations

REPORT DESCRIPTION AND FORMAT

The report provides data on market size, brand sales, market shares, distribution trends, advertising and promotional activity, historical growth, five-year sales forecasts, government regulations, and strategic analyses of product categories and major OTC companies in Canada. **NONPRESCRIPTION DRUGS CANADA 2002** comprises the following sections:

- Industry Analysis
- Products
- Major Companies
- Minor companies
- Market Watch Bulletin
- Appendix

The Products section examines 26 product categories, as detailed in Table 1. The Companies section profiles 15 major OTC manufacturers, as shown in Table 2, and 20 minor OTC suppliers, as shown in Table 3.

Kline & Company's professional staff has investigated the effects of market and regulatory changes on Canada's nonprescription drug industry. We combined historical information from our previous studies with new research to assess the major trends that are driving this industry. The study provides timely information to assist you in making important business and marketing decisions.

BENEFITS TO SUBSCRIBERS

Subscribers to **NONPRESCRIPTION DRUGS CANADA 2002** can expect the following significant benefits to assist in their business planning:

- Up-to-date sales and market share information, including five-year sales forecasts

- New product introductions in each product category
- In-depth analyses of 26 product categories
- Comprehensive profiles of 15 major OTC manufacturers
- Brief profiles of 20 minor OTC suppliers
- Advertising and promotional activity by brand, category, and major company
- Regulatory impacts on the non-prescription drug market
- Private-label activity in each product category
- Retail distribution trends
- Impact of Rx drugs and natural health products

METHODOLOGY

The data provided in this report is based on both primary interviews and secondary sources building on Kline & Company's existing database of Canadian market information. Nearly 100 interviews with company executives, provincial and national regulatory authorities, pharmaceutical trade associations, national drug wholesalers, retailers, and pharmacist organizations were conducted.

Additionally, secondary data has been scanned and filed regularly, including trade journals, consumer publications, product and price literature, national and regional periodicals, government statistics, information from past Kline surveys, and public company information such as annual reports.

SUBSCRIBER PRIVILEGES

Subscribers to **NONPRESCRIPTION DRUGS CANADA 2002** have the option of receiving the report in online or hard copy versions.

A subscription to the online version includes unlimited online access to the report for the members of subscribing organizations, in addition to one hard copy of the report. Alternatively, subscribers may elect to receive hard copies only; the hard copy subscription includes three copies of the report. Additional copies are available for a nominal fee. All subscribing companies, regardless of the report version selected, are also entitled to one day of consultation time, to be used once the entire study has been published. Please see the attached subscription agreement for pricing information.

WHO SHOULD SUBSCRIBE?

Market research managers and analysts: in order to have a handy, convenient reference of sales and market information organized in a concise format.

Marketing/product/brand managers: to remain current on changes in your product category and to have the competitive advantage of knowing what tools and strategies other marketers are utilizing.

Strategic planning/business development personnel: so that you are aware of high-growth categories and other opportunities, and what changes in the regulatory environment may affect your business.

Executives: in order to remain objective in comparing your business's progress to that of your competitors, and to gain insight into future opportunities that you may not have previously considered.

Licensing/acquisition analysts: so you may identify potential high-growth areas and recognize underdeveloped products and businesses.

OUR QUALIFICATIONS

Kline & Company, established in 1959, is recognized around the world for its expertise in conducting market studies, business planning, strategic services, and acquisition analyses. Kline has studied nonprescription drugs since 1964 and has published the syndicated study **NONPRESCRIPTION DRUGS USA** since 1969.

Headquartered in the United States, the firm has international affiliates in Europe, Japan, Brazil, Singapore, and Australia. Of unique benefit to our clients are our global capabilities and expertise in such related industries as pharmaceuticals, cosmetics and toiletries, fine chemicals, and packaging.

In addition, Kline uses a multidisciplinary approach to ensure that all knowledge, facts, and logic that can affect a project are integrated into and considered in the final outcome. This expertise allows us to identify potentially attractive opportunities and formulate sound strategies for our clients.

The Healthcare Practice has extensive experience in strategic consulting and marketing expertise in several industries and functional areas, as shown in Table 4.

In addition to Kline & Company's custom consulting work, the company has actively participated in numerous industry seminars and conferences on the nonprescription drug industry internationally and domestically. Kline has also published many syndicated studies on related topics, including the following:

- NONPRESCRIPTION DRUGS USA (annual service)
- NONPRESCRIPTION DRUGS CANADA (2000, 1997, 1994, 1992, AND 1990)
- RX-TO-OTC SWITCH: THE NEXT WAVE
- MORE POWER FOR THE RX-TO-OTC SWITCH: EXPANDING THE MARKET THROUGH NEW CATEGORIES AND INDICATIONS
- HISTORY AND IMPACT OF THE RX-TO-OTC SWITCH
- OTCs IN MANAGED CARE: ISSUES AND OPPORTUNITIES
- FUNCTIONAL FOODS: A COMPETITIVE LANDSCAPE
- COMPETITOR COST STRUCTURES
- COSMETICS & TOILETRIES USA (annual service)
- COSMETICS & TOILETRIES CANADA 2001

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Pricing and other terms are detailed in the attached subscription agreement. To subscribe to the study, please complete the enclosed subscription agreement and return it to Kline & Company. To obtain further information about this study or additional options to purchase individual sections of the study, please contact Laura Mahecha, Industry Manager, Kline Research, at (973) 435-3446 or Laura_Mahecha@klinegroup.com.

Table 1**PRODUCT CATEGORIES****COUGH AND COLD PREPARATIONS**

Allergy relief products
Cold medications
Cough syrups
Lozenges and drops
Nasal decongestants
Sinus remedies

DIGESTIVE PRODUCTS

Antacids
Antidiarrheal preparations
Laxatives
Other digestive products

INTERNAL ANALGESICS**NUTRITIONAL PRODUCTS**

Diet aids
Herbal products
Vitamins and minerals

TOPICAL PRODUCTS

Acne aids
Contact lens solutions
Diaper rash products
Eye care products
Feminine yeast infection remedies
First aid products
Foot care products
Hemorrhoidal preparations
Topical analgesics

MISCELLANEOUS PRODUCTS

Home diagnostic test kits
Sleeping aids
Smoking cessation aids

Table 2**MAJOR COMPANIES**

Abbott Laboratories
Bausch & Lomb
Bayer Group
Church & Dwight
GlaxoSmithKline
Jamieson
Johnson & Johnson
Johnson & Johnson/Merck
Novartis
Perrigo
Pfizer
Procter & Gamble
Roche Holdings
Schering-Plough
Wyeth

NEW**Table 3****MINOR COMPANIES**

Allergan
Aventis
Boiron
Boots
Bristol-Myers Squibb
Cadbury Schweppes
Chattem
Combe
Contract Pharmaceuticals, Ltd.
Del Laboratories
Holista Health
Nestle (Alcon)
Otsuka
Pangeo Pharma (Wampole)
Pharmascience
The Purdue Frederick Co.
Ricola
Stiefel
Swiss Herbal Remedies
WN Pharmaceuticals

Table 4**KLINE & COMPANY'S HEALTHCARE PRACTICE EXPERTISE**

Industries

OTC drugs
Agribusiness
Biotechnology
Diagnostics
Health and beauty aids
Managed care
Medical devices
Rx pharmaceuticals
Dietary supplements
and herbal products

Functional expertise

Acquisitions and divestitures
Competitive intelligence
Conjoint analysis
Image analysis
Industry/category/brand analysis
Manufacturing economics
Perceptual research
Profitability/financial analyses
R&D benchmarking
Rx-to-OTC switch research
Strategic planning and business development
Technology assessment
Customer satisfaction assessments

NONPRESCRIPTION DRUGS CANADA 2002

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