

Disease Dynamics in 2009

Insight and Outlook from IMS Health

IMS Health's annual review of prescribing and diagnoses trends for 2009 reveals the number of retail prescriptions dispensed in Canada grew 5.5% over 2008. Canadian pharmacies dispensed 483 million for the 12 month period ending December 2009, reflecting growing demand in consumption.

Generic medications accounted for 54.3% of all prescriptions filled by Canadians, representing only 30.1% of the total Rx dollars.

LEADING PRESCRIBED CLASSES

Cardiovasculars were the top prescribed class again (Table 1) for the 16th consecutive year with almost 74 million prescriptions dispensed valued at \$3.3 billion.

Psychotherapeutics and gastrointestinal/genitourinary agents ranked second and third with just over 61 million and 33 million prescriptions, respectively. All of the top 10 therapeutic classes showed growth in 2009 with analgesics showing the highest growth (+14.2%), followed by gastrointestinal/genitourinary (+8.1%) and neurological disorders (+7.3%). Anti-infectives grew marginally (+1.0%) as did diuretics (+2.0%).

LEADING PRESCRIBED PRODUCTS (BY BRAND-NAME)

Of the top products in 2009, Apo-folic[®], Apo-simvastatin[®], Biaxin XL[®], Champix[®], Novo-atenol[®], Pariet[®] and Viagra[®] have all dropped off the top 100. Among some of the

new entries this year are Apo-acetaminophen[®], Apo-bisoprolol[®], Apo-cal[®], Cipralax[®], Novo-ramipril[®], Pro-AAS EC-80[®] and Wellbutrin XL[®].

The top eight products are the same as in 2008 with some slight variations in order. Lipitor[®] is the top product for the sixth year, with over 15 million prescriptions dispensed. Its growth has slowed from 9% in 2008 to 2.9%. Synthroid[®] remains in the number two position with over 12 million prescriptions and continues to grow well at 5.8%.

Crestor[®] has jumped from fourth to third, with 7.7 million prescriptions and a strong growth of 26.7%. This bumped Norvasc[®] down a notch to fourth position. Pantoloc[®] and Seroquel[®] dropped off the top

Table 1

Top 10 therapeutic classes in Canada, 2009

Rank 2009	Therapeutic class	Total prescriptions± 2009 (000s)	% Change over 2008	Dollar value of Rx dispensed±± 2009 (000s)
1	Cardiovasculars	74,458	4.0	\$3,273,482
2	Psychotherapeutics	61,233	5.4	\$2,368,428
3	Gastrointestinal/genitourinary	33,542	8.1	\$1,875,357
4	Cholesterol agents	31,839	6.8	\$2,594,714
5	Hormones	26,147	2.9	\$1,022,490
6	Analgesics	25,252	14.2	\$1,026,467
7	Anti-infectives, systemic	24,738	1.0	\$887,468
8	Diabetes therapy	21,360	5.9	\$908,471
9	Neurological disorders	20,008	7.3	\$1,095,030
10	Diuretics	17,524	2.0	\$181,222

± Estimated prescriptions dispensed in Canadian retail pharmacies. Includes new and refills.

±± Includes cost of drugs plus any mark-ups and pharmacists' professional fees. Excludes hospitals.

10 and Nexium® and Actonel® have worked their way up into the top 10. Seroquel® dropped the most both in position and growth from ninth to 121st position and declined by 79% with respect to prescription volume. This is due to generic equivalents entering the market in the second half of 2008. Pantoloc® and Altace® have the second and third highest decline at 63% and 30% respectively. This is also due to generic erosion of their market shares.

Ciprallex® has the strongest brand growth of the top 100 products at 47.2%, with Lyrica® next at 41%. Ciprallex® is the brand that has jumped the highest in position of the top 100, going from 112th in 2008 to 73 in 2009. No new products launched in 2009 made the top 100.

LEADING REASONS FOR VISITING A PHYSICIAN'S OFFICE

Hypertension has been the main driver of patient visits in Canada for the last decade and remained the most common reason for visiting a physician in 2009 (20.9 million diagnosed patient visits), followed by routine physical examinations (10.7 million visits) (Table 2). **CPM**

Table 2
Top 10 reasons for physician visits in Canada

Reason for visit	Estimated number of patient visits (000s)
Hypertension	20,658
Routine general medical exam	10,492
Diabetes	9,747
Depression	8,581
Anxiety	6,366
Acute upper respiratory infection	6,296
Normal pregnancy supervision	4,955
Hyperlipidemia	4,748
Other unknown and unspecified cause of morbidity	4,501
Surveillance of contraceptive methods	3,527

Source: IMS Health, Canadian Disease and Therapeutic Index.

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