

## **The Pharmaceutical Company Outlook to 2011: Financial and Strategic Analysis of the Sales Outlook for Big Pharma, Mid Pharma, Japan Pharma and Biotech**

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### **Description**

#### Introduction

Based on an analysis of 46 companies and 1,000+ products, Datamonitor forecasts that pharmaceutical industry ethical sales will increase at a modest 4.9% CAGR 2005-11. However, behind this industry average figure there are strategic segments of the market that offer double-digit growth rates through barriers against generic competition and the opportunity for aggressive indication broadening.

#### Scope

Financial and Strategic Analysis of the Sales Outlook to 2011 for Big Pharma, Mid Pharma, Japan Pharma and Biotech

Quantitative analysis of the revenue balance of launches and expiries for each peer set member to 2011

Assessment of current and forecast 2011 therapeutic focus and product type focus for each peer set member

2002-2006 operating cost and EBIT margin analysis for each peer set member

#### Highlights

Faced with failing growth, Big Pharma is expected to pursue strategic options including operational cost efficiencies, M&A with other Big Pharma companies, biotech, Mid Pharma CNS players and/or generics manufacturers and acquisitional moves outside of 'pharma space' to increase presence in medical devices, diagnostics and consumer healthcare.

Biotech will be the fastest growing peer set with a 10.1% sales CAGR 2005-11. Biotech is almost totally insulated from generic threat because (1) biotech portfolios are often too young to contain expired products and (2) even if products have expired, the predominantly biologic nature of biotech portfolios is a major barrier to generic entry.

The fastest growing Japanese companies (such as Daiichi-Sankyo and Astellas) will receive the majority of their growth from expanding sales of already marketed products whereas the slowest growing companies (such as Takeda and Eisai) are burdened with heavy sales declines from patent expiries particularly in the gastrointestinal therapy area.

#### Reasons to Purchase

Understand the strategic motives behind the recent wave of Big Pharma acquisitions of monoclonal antibody companies

Identify the rare examples of promising high growth CNS products located in the Mid Pharma peer set

Learn how biotech faces slowing growth momentum due to second generation biologics cannibalizing sales of first generation predecessor products.

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