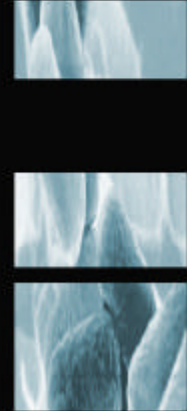
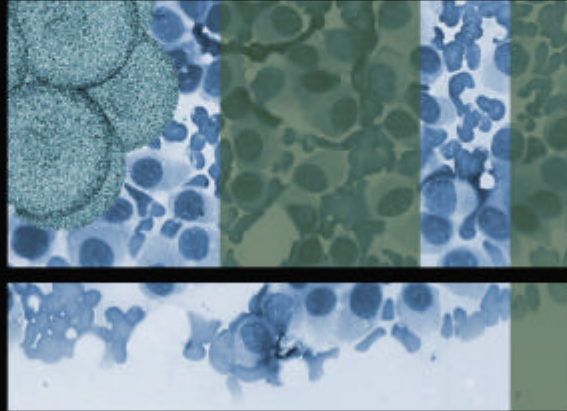
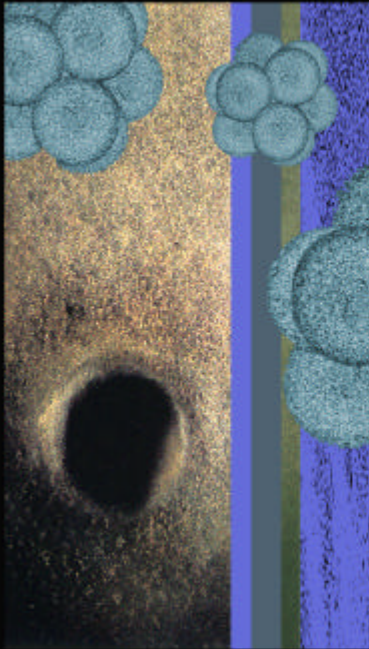


The World Biotech Market 2005

A visiongain report



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Contents

Chapter 1: Executive Summary of World Biotech Market, 2005

- 1.1 Abstract of Biotech, 2005
- 1.2 Aims, Scope and Format of Biotech, 2005

Chapter 2: Introduction to Biotechnology

- 2.1 What is Biotechnology?
- 2.2 The Uniqueness of Biopharmaceuticals: Turning Medicine Around
- 2.3 Biotechnologies Used and Their Applications to Pharma
 - 2.3.1 Bioprocessing Technology
 - 2.3.2 Monoclonal Antibodies
 - 2.3.3 Recombinant DNA Technology
 - 2.3.4 Cloning
 - 2.3.4.1 Molecular Cloning
 - 2.3.4.2 Cellular Cloning
 - 2.3.4.3 Animal Cloning
 - 2.3.4.4 Protein Engineering
- 2.4 The Future Biopharmaceutical Market
 - 2.4.1 Biopharmaceutical 2004 Market Capitalisation Worth \$311bn
 - 2.4.2 Over 7000 Biotechnology Patents Granted Per Annum Since 1998
 - 2.4.3 2004 Witnessed 54 New Biopharmaceuticals Approved by the FDA
 - 2.4.4 Biopharmaceuticals Share 12.5% of 2004 Global Prescriptions

Contents

Chapter 3: Diseases Treated by Biopharmaceuticals

- 3.1 Biopharmaceuticals Are Versatile Agents
- 3.2 Orphan Diseases Are A Major Target of Biotech: 3 Out of 10 2004 Orphan Disease Drug Approvals Were Biopharmaceuticals
- 3.3 Overview of Major and Orphan Diseases Treated By Biopharmaceuticals, 2005

Chapter 4: Overview of Biopharmaceuticals Market, 2003-2004

- 4.1 Monoclonal Antibodies: Leading Class of Biopharmaceuticals in 2004 With Sales of \$13bn
- 4.2 Biopharmaceuticals by Therapy Class: Blood Disorders Share Over A Quarter of the 2004 Biopharmaceuticals Market
- 4.3 2004 Biopharmaceuticals Market Worth a Staggering \$55.7bn
- 4.4 The Top 20 Selling Biopharma Drugs of 2004 Accounted For 62% of Total Revenues
- 4.5 The Top 3 Biopharmaceuticals Products of 2004 Sold Over \$9bn
 - 4.5.1 Procrit/Eporex - The Number One Biopharmaceutical Struggles at the Top
 - 4.5.2 Risperdal Performs Well Thanks to New Delivery Technology
 - 4.5.3 Epogen: The Third Best Selling BiopharmDrug of 2004
- 4.6 Santura: The Highest Earning Newcomer of 2004

Contents

Chapter 5: Company Revenues and Market Share, 2004

- 5.1 Amgen: The Reign Continues With A 17% Share of 2004 Market
 - 5.1.1 Who Are Amgen?
- 5.2 Biotech Company Winners and Losers in 2004: Abbott, Sanofi-Aventis and Roche
- 5.3 BMS: The Best Company Newcomer of 2004
- 5.4 Biotech Companies Show High Growth Rates

Chapter 6: Biopharmaceutical Pipeline

- 6.1 Technology Driving Biopharma Pipeline
- 6.2 Biotech Targeting Chronic Illness
- 6.3 Arthritis Biopharmaceutical Pipeline, 2005
- 6.4 MS Biopharmaceutical Pipeline, 2005
- 6.5 Late-Stage Biopharmaceutical Oncology Pipeline, 2005
- 6.6 Late Stage Biopharmaceutical Vaccine Pipeline, 2005
- 6.7 Blood Disorders Biopharmaceutical Pipeline, 2005
- 6.8 Late Stage Biopharmaceutical Endocrine Pipeline, 2005
- 6.9 Anti-Infectives Biopharmaceutical Pipeline, 2005
- 6.10 Enzyme Deficiency Biopharmaceutical Pipeline, 2005
- 6.11 Late Stage Biopharmaceutical Ophthalmic Pipeline, 2005
- 6.12 Late Stage Biopharmaceutical 'Other' Pipeline, 2005

Contents

Chapter 7: Biopharmaceutical Market Forecast by Therapeutic Area, 2003-2010

- 7.1 Blood Disorders
- 7.2 Endocrine Disorders
- 7.3 Multiple Sclerosis
- 7.4 Oncology
- 7.5 Anti Infectives
- 7.6 Enzyme Deficiency Disorders
- 7.7 Vaccines
- 7.8 Arthritis
- 7.9 Ophthalmics
- 7.10 Others
- 7.11 Biopharmaceutical Market Set To Almost Triple By
2010

Chapter 8: Summary of 2010 Biopharmaceuticals Market

- 8.1 Aransep: The Top Selling Biopharmaceutical of 2010
With Sales of \$5.2bn
- 8.2 Blood Disorders Will Remain Market Leaders
- 8.3 Ophthalmic Biopharmaceuticals: The Fastest Growing
Therapeutic Class 2003-2010
- 8.4 By 2010 Biopharmaceuticals Will Account for Over
17% of All Drug Prescriptions

Contents

Chapter 9: Introduction to Biogenics

- 9.1 What are Biogenics?
- 9.2 The Biogenic Threat Looms Large
- 9.3 All Change in 2003: CDER to CBER
- 9.4 How are Approval Pathways Limiting the Development of Biogenics?
- 9.5 Omnitrope Approved in Australia, Will Europe and the US Follow?
- 9.6 High Cost of Market Entry
- 9.7 Manufacturing Capacity Problems
- 9.8 Biopharma Vs Biogenics: The Fight Continues
 - 9.8.1 Bioequivalence or Biosimilarity?
- 9.9 Will the Benefits of Biogenics be as Great as Anticipated?
- 9.10 How Imminent is the Threat from Biogenic Competition?

Chapter 10: The Potential Biogenic Market

- 10.1 \$13bn of Biopharmaceuticals To Lose Patency Protection By 2007
- 10.2 Eleven Biopharmaceuticals to Face Patent Expiry by 2007
- 10.3 High-Revenue Generating Biopharmaceuticals Face Patent Expiry Before 2007
- 10.4 High-Profile Biopharmaceuticals With Patent Expirations Before 2007 Revenue Forecast, 2003-2010
- 10.5 Erythropoiteins Are Most At Risk To Biogenic Competition

Contents

Chapter 11: Biopharmaceutical Market Challenges

11.1 BioTech's Delivery Challenge

- 11.1.1 Pulmonary Delivery: An Innovative Alternative to the Needle?
- 11.1.2 The Major Issues of the Pulmonary Pathway
- 11.1.3 Does Protein Formulation Affect Pulmonary Delivery?
- 11.1.4 Does Pulmonary Drug Delivery Have a Future?
- 11.1.5 Pegylated Forms Set to Revolutionise Delivery
- 11.1.6 Pegylation Can Extend Patencies! The Filgrastim Example
- 11.1.7 Transdermal Technologies
- 11.1.8 Microneedles for Transdermal Delivery of Vaccines
- 11.1.9 Nasal Delivery Is Demonstrating Promise
- 11.1.10 Moving Towards Pills? Altus' Unique Technology
- 11.1.11 New Delivery Technologies: A Pharmacy or Medical Benefit?
- 11.1.12 Innovative Insulin Delivery Technology: The Race is On!
- 11.1.13 Numerous Potential Blockbusting NonInjected Insulins Set to Arrive 2005-2009

11.2 Manufacturing Capacity Shortfall

- 11.2.1 Why is There a Shortfall in Manufacturing Capacity for Biopharmaceuticals?
- 11.2.2 Make Vs. Buy: The 1980s BioIndustry
- 11.2.3 CMO Manufacturing Capacity was Adequate for the Supply of Clinical Materials Only
- 11.2.4 Late-Stage Products have absorbed CMO Clinical Manufacturing Capacity
- 11.2.5 How is the Manufacturing Capacity Shortfall Being Overcome?

Contents

- 11.2.6 Does The Future for Biopharmaceutical Manufacturing Lie with Transgenics?
- 11.3 The Cost of Biopharmaceuticals
 - 11.3.1 The Top Five Biopharmaceuticals Each Cost at Least \$10K Per Patient Per Annum
 - 11.3.2 Monoclonal Antibodies and CSF's High Costs Reflect Production Difficulties
 - 11.3.3 Yeast-Based Systems May Bring Down the Cost of Therapeutic Proteins in the Future
- 11.4 Acquiring Capital
 - 11.4.1 Financing of Biotech Companies in 2003 Neared \$17bn
 - 11.5 Reliance Upon University/Company Collaborations
 - 11.5.1 The Need For Collaboration
 - 11.5.2 Biotech's Increasing Role of Commercialising University Research
 - 11.5.3 Future Biotech Innovation Lies With Academia
 - 11.5.4 The Risky Path from Bench to Market
 - 11.5.5 Collaboration Strategies & Becoming the Partner of Choice
 - 11.5.5.1 Objectives That Support Strategic Goals
 - 11.5.5.2 Understanding the Value Brought to an Alliance
 - 11.5.5.3 Identifying and Understanding Potential Partners
 - 11.5.5.4 Due Diligence
 - 11.5.5.5 Promoting Capabilities to Potential Partners
 - 11.5.5.6 Maintaining a Relationship Through Structured Interactions
 - 11.5.5.7 Gaining Competitive Advantage
 - 11.5.5.8 Collaboration Management: Developing and Maintain A Deal
 - 11.5.5.9 Strategic Goals to Consider
- 11.6 Regulatory Issues
 - 11.6.1 Biopharmaceuticals and the FDA
 - 11.6.2 FDA Improving Upon Biologics Approval Wait

Contents

Chapter 12: Venture Capital Investment & Biotech

- 11.7 Biogeneric Threat
- 11.8 Dependence upon Venture Capital Investment
- 11.9: Drivers and Restraints of Biopharmaceutical Market Growth
 - 11.9.1 Drivers
 - 11.9.2 Restraints

- 12.1 What is Venture Capital Investment?
- 12.2 What does VC Offer?
- 12.3 What Do Venture Capitalists Do?
- 12.4 Who Are Venture Capitalists?
 - 12.4.1 Banks as Venture Capitalists
 - 12.4.2 Business Angels (Wealthy Individuals) as Venture Capitalists
 - 12.4.3 Corporate or Direct Investors as Venture Capitalists
 - 12.4.4 Government Grants and Governments as Venture Capitalists
 - 12.4.5 Venture Capital Firms
 - 12.4.6 Other Types of Venture Capitalists
- 12.5 Why Do Biotech Companies Need VC Funding?
- 12.6 Venture Capital Investment in the US Biotech Market
 - 12.6.1 US VC Investment Now Recovering Following Stockmarket Crash in 2000
 - 12.6.2 329 US Biotech VC Investments Made in 2004, Providing Over \$3.8bn
 - 12.6.3 Synta Provides 2004's Largest US Investment Sum With \$80m
 - 12.6.4 MPM Capital 2004's Most Active US Biotech VC Firm
 - 12.6.5 Company Expansion Stage is the Most Favourable for VC Investment
- 12.7 Increase in VC Funding of European Biotech

Contents

Chapter 13: The Global Biopharmaceutical Market by Region, 2003-2010

- 12.8 PE European Investments in Biotech Followed Similar Trends as in the US
- 12.9 European PE Biotech Investments are a Small part of the Funding Market

Chapter 14: The Human Genome Project and Its Influence on the Biotech Industry

- 13.1 The World Biopharmaceutical Market is Dominated by the US
- 13.2 Both the Japanese and European Biotech World Market Share Set to Fall by 2010
- 13.3 The US Biotech Market Will Retain Its World Dominance
- 13.4 The European Biotech Market Will See Reduced Growth
- 13.5 European Biotech Industry Faces VC Funding Drop
- 13.6 Price Cuts in Japanese Biotech Market
- 13.7 Asia-Pacific Region: A Dormant Giant?
- 13.8 Biotech Industries in the Asia-Pacific Region are Growing Rapidly
- 13.9 China has the Most Biotech Companies in the Asia-Pacific region
- 13.10 Other World Markets
 - 13.10.1 Russia Will See Growth in Biopharma Generics
 - 13.10.2 Israel is and Area of Biotech Industry More than a Market for Biotech Drugs

Chapter 15: Conclusion: Big Pharma Must Invest into the Biotech Arena

- 14.1 Applications and Future Developments of the HGP

- 15.1 Conclusion

Contents

List of Tables

Table 2.1	Definitions of Selected Biopharmaceuticals
Table 2.2	Summary of Biotechnologies
Table 3.1:	Overview to Major Diseases and Selected Orphan Diseases Treated by Biopharmaceuticals, 2005
Table 4.6:	Revenue (\$m) for Classes of Technology Biopharmaceuticals, 2004
Table 4.1	Biopharmaceutical Revenues (\$m) by Technology Class, 2004
Table 4.2:	Vaccine Products in 2004 Market
Table 4.3	Monoclonal Antibody Products % Growth Rates, 2004
Table 4.4	Biopharmaceuticals Revenue (\$m) by Therapeutic Area, 2004
Table 4.5:	Blood Modifiers by Revenue (\$m), 2004
Table 4.6:	Biopharmaceutical Revenues (\$m) in 2003 Top 400 by Drug Type, 2004
Table 4.7	Total Biopharmaceutical Revenues 2003 & 2004
Table 4.8:	Top 20 Selling Biopharmaceuticals, 2004
Table 4.9:	Revenues of Newcomers to 2004 Biopharmaceuticals Market
Table 5.1:	Biotech Company Revenues (\$m), 2003 & 2004, and 2004 Company Market Share (%)
Table 5.2:	Roche Biopharmaceutical Portfolio By Revenue (\$m), 2003 and 2004
Table 5.3:	GSK Biopharmaceutical Portfolio By Revenue (\$m), 2003 and 2004
Table 5.4:	Schering Plough Biopharmaceutical Portfolio By Revenue (\$m), 2003 and 2004
Table 5.5:	Amgen's Product Portfolio By Revenue (\$m), 2004
Table 5.6:	Amgen Total Revenue (\$bn), 2001-2004
Table 6.1:	Overview of Biotech Pipeline By Biotechnology Type, 2005
Table 6.2:	Arthritis Biopharmaceutical Pipeline, 2005
Table 6.3:	MS Biopharmaceutical Pipeline, 2005
Table 6.4:	Late Stage Biopharmaceutical Oncology Pipeline
Table 6.5:	Late Stage Biopharmaceutical Vaccine Pipeline, 2005
Table 6.6:	Blood Disorders Biopharmaceuticals Pipeline, 2005
Table 6.7:	Late-Stage Biopharmaceutical Endocrine Pipeline, 2005
Table 6.8:	Anti-Infective Biopharmaceutical Pipeline, 2005

Contents

Table 6.9: Enzyme Deficiency Disorder Biopharmaceutical Pipeline, 2005

Table 6.10: Late-Stage Biopharmaceutical Ophthalmic Pipeline, 2005

Table 6.11: Late-Stage Biopharmaceutical Others Pipeline, 2005

Table 7.1: Treatment of Blood Disorder by Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.2: Total World Biopharmaceutical Blood Disorder Market Forecast (\$m), 2003-2010

Table 7.3 Endocrine Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.4: Total World Biopharmaceutical Endocrine Market Forecast (\$m), 2003-2010

Table 7.5: Multiple Sclerosis Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.6: Total World Biopharmaceutical Multiple Sclerosis Market Forecast (\$m),2003-2010

Table 7.7: Oncology Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.8: Total World Biopharmaceutical Oncology Market Forecast (\$m), 2003-2010

Table 7.9: Anti-Infective Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.10: Total World Biopharmaceutical Anti-Infectives Market Forecast (\$m), 2003-2010

Table 7.11: Enzyme Replacement Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.12: Total World Biopharmaceutical Enzyme Replacement Market Forecast (\$m), 2003-2010

Table 7.13: Vaccine Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.14: Total World Biopharmaceutical Vaccine Market Forecast (\$m), 2003-2010

Table 7.15: Arthritis Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.16: Total World Biopharmaceutical Arthritis Market Forecast (\$m), 2003-2010

Table 7.17: Ophthalmic Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.18: Total World Biopharmaceutical Ophthalmic Market Forecast (\$m), 2003-2010

Contents

Table 7.19: Other Biopharmaceutical by Revenue (\$m), 2003 and 2004

Table 7.20: Total World Biopharmaceutical Other Market Forecast (\$m),
2003-2010

Table 7.21: Total Global Biopharmaceutical Market Revenue (\$bn) Forecast
2003-2010

Table 8.1: Top 10 Selling Biopharmaceuticals of 2010

Table 8.2: Total Global Biopharmaceutical Market Revenue (\$bn) Forecast
by Therapeutic Class, 2003-2010

Table 8.3: Market Share of Biopharmaceuticals By Therapeutic Class, 2003
& 2010 Comparison

Table 8.4: Biopharmaceuticals CAGR% By Therapeutic Class, 2003-2010

Table 8.5: Revenues (\$bn) of Total Prescriptions By Technology Type 1999-
2010

Table 9.1 Biopharmaceuticals Facing Patent Expiry and their Biogeneric
Status, 2005

Table 9.2: Key Supporters For Biogenerics And Their Opinions

Table 9.3: Key Opponents Arguments Against Biogenerics

Table 10.1: Biopharmaceuticals Facing Patency Expiry by 2007

Table 10.2 Revenue (\$m) Forecast (2003-2010) of 6 High Profile
Biopharmaceuticals Facing Patency Expiry Before 2007

Table 11.1 Mode of Administration of 2004's Top 5 Biopharmaceuticals

Table 11.2: Expected Blockbuster Noninjected Insulins From 2005

Table 11.3: Total European IPOs by Country, 2003

Table 12.1: US and European VC Investment (\$m) Into Biotech Companies,
1997-2003

Table 12.2: Total US VC Investment (\$bn), 1994-2004

Table 12.3: Biopharmaceutical Venture Capital Investments By Quarter,
2003 vs 2004

Table 12.4: Number of Biopharmaceutical Venture Capital Investments By
Quarter, 2003 vs 2004

Table 12.5: Top 5 Largest Biotech Investments (\$m) by Company, 2004

Table 12.6: Most Active Biotech Venture Capital Firms of 2004

Table 12.7: US VC Investments by Company Stage, 2003-2004

Table 12.8: PE European Investments (\$m) in Biotech, 1997-2003

World Biotech 2005

Table 13.1: Total Global Biopharmaceutical Market Revenue Forecast (\$bn), 2003-2010

Table 13.2: Global Market Share (%) and Revenue (\$bn) by Country/Region, 2003

Table 13.3: Global Market Share (%) and Revenue (\$bn) by Country/Region, 2010

Table 13.4: US Biotech Market Revenue (\$bn) Forecast, 2003-2010

Table 13.5: EU Biotech Market Revenue (\$bn) Forecast, 2003-2010

Table 13.6: Japanese Biotech Market Revenue (\$bn) Forecast, 2003-2010

Table 13.7: Asia-Pacific Biotech Market Revenue (\$bn) Forecast, 2003-2010

List of Graphs

Graph 2.1: Biopharmaceutical Market Capitalisation (\$bn), 1994-2004

Graph 2.2: Total Number of Biotechnology Patents Granted: 1992-2002

Graph 2.3: Number of New Biological FDA Approvals: 1994-2004

Graph 2.4: Biopharmaceuticals Share of Global Prescriptions 1999-2004

Graph 4.1: Global Sales (\$m) of Biopharmaceuticals by Technology Class, 2004

Graph 4.2: Global Sales (\$m) of Biopharmaceuticals by Therapeutic Area, 2004

Graph 4.3: Total Global Biopharmaceutical Revenue, 2003-2004

Graph 4.4: Top 20 Selling Biopharmaceuticals, 2004

Graph 4.5: Global Procrit/Epex Sales (\$m), 2001-2004

Graph 4.6: Global Risperdal Sales (\$m), 2001-2004

Graph 4.7: Global Epogen Sales (\$m), 2001-2004

Graph 4.8: Revenues for Newcomers to the Global Biopharmaceutical Market, 2004

Graph 5.1: Biotech Company Revenues (\$m), 2003 & 2004

Graph 5.2: Company % Change in Revenue, 2003-2004

Graph 5.3: 2004 Company Newcomers to Biopharmaceuticals Market By Revenue (\$m)

Graph 5.4: Amgen Company Revenue (\$bn), 2001-2004

Graph 5.5: Amgen Change in Revenue (%), 2002-2004

Graph 6.1: Biopharmaceutical Pipeline by Biotechnology Type, 2005

Contents

- Graph 6.2: Duration of Therapies of Biotech Pipeline Products in Late-Stage Development, 2003
- Graph 7.1: Total World Biopharmaceutical Blood Disorder Market Forecast (\$bn), 2003-2010
- Graph 7.2: Total World Biopharmaceutical Blood Disorder Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.3: Total World Biopharmaceutical Endocrine Market Forecast (\$bn), 2003-2010
- Graph 7.4: Total World Biopharmaceutical Endocrine Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.5: Total World Biopharmaceutical Multiple Sclerosis Market Forecast (\$bn), 2003-2010
- Graph 7.6: Total World Biopharmaceutical Multiple Sclerosis Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.7: Total World Biopharmaceutical Oncology Market Forecast (\$bn), 2003-2010
- Graph 7.8: Total World Biopharmaceutical Oncology Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.9: Total World Biopharmaceutical Anti- Infectives Market Forecast (\$bn), 2003-2010
- Graph 7.10: Total World Biopharmaceutical Anti-Infectives Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.11: Total World Biopharmaceutical Enzyme Replacement Market Forecast (\$bn), 2003-2010
- Graph 7.12: Total World Biopharmaceutical Enzyme Replacement Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.13: Total World Biopharmaceutical Vaccine Market Forecast (\$bn), 2003-2010
- Graph 7.14: Total World Biopharmaceutical Vaccine Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.15: Total World Biopharmaceutical Arthritis Market Forecast (\$bn), 2003-2010
- Graph 7.16: Total World Biopharmaceutical Arthritis Market Revenue Growth Forecast (%), 2004-2010

Contents

- Graph 7.17: Total World Biopharmaceutical Ophthalmic Market Forecast (\$bn), 2003-2010
- Graph 7.18: Total World Biopharmaceutical Ophthalmic Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.19: Total World Biopharmaceutical Other Market Forecast (\$bn), 2003-2010
- Graph 7.20: Total World Biopharmaceutical Other Market Revenue Growth Forecast (%), 2004-2010
- Graph 7.21: Total Global Biopharmaceutical Market Revenue Growth (%), 2004-2010
- Graph 7.22: Total Global Biopharmaceutical Market Revenue (\$bn) Forecast 2003-2010
- Graph 8.1: Top-10 Selling Biopharmaceuticals of 2010 (\$m)
- Graph 8.2: Total Global Biopharmaceutical Market Revenue (\$bn) Forecast by Therapeutic Class, 2003-2010
- Graph 8.3: % Change of Market Share By Therapeutic Area, 2003 & 2010
- Graph 8.4: Biopharmaceuticals CAGR% By Therapeutic Class, 2003-2010
- Graph 8.5: Biopharmaceutical Revenue (\$bn) of Total Prescriptions, 1999-2010
- Graph 10.1 Targets Of Biogeneric Companies By Drug Class
- Graph 10.2: Total Revenue (\$bn) of Six High Profile Biopharmaceuticals Facing Patent Expiry By 2007, 2003-2010
- Graph 10.3: Total Revenue Growth (%) of Six High Profile Biopharmaceuticals Facing Patent Expiry By 2007, 2003-2010
- Graph 11.1 Cost of Top Five Selling Biopharmaceuticals of 2004 (\$ Per Patient Per Year)
- Graph 11.2: Total Financing of Biopharmaceuticals (\$bn), 2000-2003
- Graph 11.3: Number of Pharmaceutical Alliances Formed By Party, 1997-2001
- Graph 11.4: % of Alliances Formed With Licensing, By Party During 2001
- Graph 11.5: % of Alliances Formed With Development/Co-Development, By Party During 2001
- Graph 11.6: % of Alliances Formed With Research, By Party During 2001
- Graph 11.7: Mean FDA Approval Time For New Biopharmaceuticals, 2000-2004

Contents

- Graph 12.1: US and European VC Investment (\$m) Into Biotech Companies, 1997-2003
- Graph 12.2: Total US VC Investment (\$bn), 1994 - 2004
- Graph 12.3: % Change From Previous Year of Total US VC Investment, 1995- 2004
- Graph 12.4: Total Biotech VC Investments (\$m) By Quarter, 2003-2004
- Graph 12.5: % Change of Biotech VC Investments By Quarter, 2003-2004
- Graph 12.6: Number of Biotech VC Investments By Quarter, 2003 -2004
- Graph 12.7: % Change of Number of Biotech VC Investments By Quarter, 2003 -2004
- Graph 12.8: PE European Investments (\$m) in Biotech, 1997-2003
- Graph 12.9: % Change of PE European Investments (\$m) in Biotech, 1998-2003
- Graph 13.1: Change in Market Share (%) by Country/Region, 2003-2010
- Graph 13.2: US Biotech Market Revenue (\$bn) Forecast, 2003-2010
- Graph 13.3: US Biotech Market Revenue Growth Forecast (%), 2003-2010
- Graph 13.4: EU Biotech Market Revenue (\$bn) Forecast, 2003-2010
- Graph 13.5: EU Biotech Market Revenue Growth Forecast (%), 2003-2010
- Graph 13.6: Japanese Biotech Market Revenue (\$bn) Forecast, 2003-2010
- Graph 13.7: Japanese Biotech Market Revenue Growth Forecast (%), 2003-2010
- Graph 13.8: Asia-Pacific Biotech Market Revenue (\$bn) Forecast, 2003-2010
- Graph 13.9: Asia-Pacific Biotech Market Revenue Growth Forecast (%), 2003-2010

List of Charts

- Chart 4.1: Biopharmaceutical Market Share (%) by Class, 2004
- Chart 4.2: Biopharmaceutical Market Share (%) by Therapeutic Class, 2004
- Chart 4.3 Top 20 Selling Biologics Share (%) of Total Biopharmaceuticals Market
- Chart 4.4: Global Market Share (%) for the Top 3 Selling Biologics, 2004
- Chart 5.1: 2004 Market Share (%) By Company

Contents

Chart 6.1: Pipeline share (%) of Biopharmaceuticals Duration of Therapy ,

2003
Chart 11.1: Biopharmaceutical Industry Financing By Source, 2003

Chart 8.1: Market Share of the Top-10 Selling Biopharmaceuticals (%),
2010

Chart 8.2: Biopharmaceutical Therapeutic Class Market Share (%), 2003

Chart 8.3: Biopharmaceutical Therapeutic Class Market Share (%), 2010

Chart 10.1: Six High Profile Biopharmaceuticals Revenue Share (%) of Total
Biopharmaceuticals Facing Patency Expiry By 2007, 2004

Chart 12.1: US VC Investments in Biotech by Company Stage, 2004

Chart 13.1: Biopharmaceuticals Market Share (%) by Country/Region, 2003

Chart 13.2: Biopharmaceutical Market Share (%) by Country/Region, 2010

World Biotech 2005

Table A: List of Companies Mentioned

3M	Boston Millennia Partners	Genrex Biotech
Abbott Laboratories	Boston Scientific	Genzyme
Abgenix	Burrill & Company	Gilead Sciences
Abraxis	Cangene	GlycoFi
Addex Pharmaceuticals	Cell Genesys	Goodwin Biotechnology
Alfacell	Celltech	GSK
AlgoRx	Centocor	Human Genome Sciences
Allergan	Chiron	ImClone Systems Inc
Alta Partners	Chugai	Indevus
Altus	Connetics Corp	Intarcia
Amarillo	Corus	Intercell
American Pharma Partners	CoTherix	ISTA
Amgen	Covance	JDS
Antisoma	CTI	Jerini
Ardana	Daiichi	Johnson & Johnson
Arpida	Danek	Lonza
AstraZeneca	Dendreon	Lundbeck
Aventis	Domain Associates	Mallinckrodt
Aventis	DSM	Maxgen
Basilea	DynPort Vaccine	Maxim
Bausch & Lomb	Elan Corp	MedImmune
Bayer	Eli Lilly	Medtronic
Biogen Idec	Endo Pharmaceuticals	Merck
Biomarin	Enron	Millennium Pharmaceuticals
Biomura	Evotec	MPM Capital
BioScience Contract Production	Eximias	NCI
BMS	Eyeteck	Nobex Corp
Boehringer-Ingelheim.	Fletcher Spaght Ventures	Novartis
Bone Care	Galderma	Novo Nordisk
Borealis Ventures.	Genentech	NPS

continued overleaf

World Biotech 2005

Table A: List of Companies Mentioned

Odyssey	Vicuron Pharma
OSI	Village Ventures
Paion	WorldCom
Peninsula Equity Partners	Wyeth
Pfizer	Xenova
Pharmion Corp	YM Biosciences
Polaris Ventures	
Prospect Venture Partners	
Roche	
Salix	
Sandoz	
Sanofi-Aventis	
Santarus	
Savient	
Schering AG	
Schering Plough	
Schroder Ventures Life Sciences	
Sepracor	
Serono	
Shire Pharmaceuticals	
Sofamor	
SouthWest Oncology	
Synta	
Techno Ventures Management	
Telix	
Transkaryotic	
United Pharmaceuticals	
Unither	
Versant Ventures	
Vertex	

source: *visiongain, 2005*

World Biotech 2005

Chapter 1: Executive Summary of The World Biotech Market, 2005

1.1 Abstract of Biotech, 2005

- The biotechnology industry is a major profit area that has witnessed incredible expansion since its emergence during the 1970's.
- Visiongain values the 2005 total global biopharma market at \$64.3bn. This is an 15.3% growth from 2004, where revenues were \$55.7bn.
- Over the seven year forecast period from 2003 to 2010, visiongain expects the market to continue its double-digit growth rate.
- By the end of the decade, the market could reach \$118.6bn revenue total, close to a tripling of its 2003 revenues of \$44.9bn.
- Increased R&D effort, lower FDA approval time and novel and innovative treatments are aiding growth.
- The FDA approval of over 50 biopharmaceuticals during 2004 highlights market expansion and why biopharmaceuticals accounted for 12.5% of all drug prescriptions.
- Visiongain estimates that by 2010, 50% of all drugs approved will be biopharmaceutical.
- For all biotech markets future success is predicted. The two major threats the industry faces in the coming years are the increasing threat of biogenerics and the difficulty in acquiring capital.

World Biotech 2005

1.2 Aims, Scope and Format of World Biotech, 2005

This report begins by introducing biopharmaceuticals and the technologies involved in their development and manufacture. The market is also introduced, with a brief overview of its history. Chapter 3 provides an overview of disease information that biopharmaceuticals treat.

The report then goes on to value the 2003/2004 market for biopharmaceuticals, including the leading brands, drug classes and the companies dominating the market.

The report then examines pipelines for each therapeutic class of biopharmaceuticals, and goes on to highlight the sales potential for all leading products and key pipeline candidates from 2003 to 2010.

Forecasts for each biopharmaceutical therapeutic area is provided in chapter 7, with in-depth analysis and forecasting by drug type.

A summary chapter of the 2010 market is then provided in Chapter 8, illustrating the predicted leading brands and therapeutic categories on the market by 2010.

The threat of biogenerics is examined and the potential value of the biogeneric market is detailed in Chapter 10, with revenues for the six major biologics under patent expiry threat.

This is followed by a detailed discussion regarding the challenges the biopharma market will face in the coming years. Each challenge is detailed with strategies that can be used by biotech companies to overcome them. The major challenge of venture capitalism within biotech is discussed in Chapter 12.

Chapter 13 details the global biopharmaceutical market from 2003 to 2010 by country/region. Market share in 2003 and 2010 is compared for the US, EU, Japan and the Asia-Pacific region. Forecast revenues are also provided for each of these countries/regions.

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The report then goes on to discuss the impact of the human genome project on the biopharmaceutical market. *World Biotech, 2005* ends with a concise conclusion, summarising the main issues analysed within the report.

World Biotech, 2005 represents a key tool for companies wishing to enter into or expand into the biopharma market. The reader will be left with a clear idea of therapeutic targets currently under development within the field, whom is responsible for this development and the competition that companies will face from current and future products.