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Top 10 World's Leading PHARMACEUTICAL Companies

A NEW THOUGHT-PROVOKING REPORT ON PERFORMANCE, CAPABILITIES, GOALS AND STRATEGIES OF THE MAJOR COMPETITORS IN THE WORLDWIDE PHARMACEUTICAL MARKET

- Abbott
- AstraZeneca
- Eli Lilly
- GlaxoSmithKline
- Johnson & Johnson
- Merck
- Novartis
- Pfizer
- Roche
- Sanofi-Aventis

Contains nearly 1,200 pages and 100 tables

Includes a 25-page Worldwide Market Overview

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VENTURE PLANNING GROUP

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INFORMATION • INTELLIGENCE • ANALYSIS • INSIGHT

Rationale & Objectives

A strategic assessment of the competitive environment is unquestionably one of the highest priority management responsibilities -- crucial to business survival, growth and profitability. Timely and factual competitive intelligence is vital to the success of all business functions, especially Planning, Marketing, R&D and Manufacturing. In a highly dynamic and fragmented pharmaceutical market, besieged by intense competition, the rapid pace of technological innovations, and the uncertainty regarding future government regulations, the ability to anticipate new competitive product introductions and marketing strategies is particularly important... and spells the difference between success and failure.

The **Top 10**, a unique series of market intelligence studies introduced by VENTURE PLANNING GROUP in 1987, is designed to provide the pharmaceutical industry executives with strategically significant competitor information, analysis, and insight critical to the development

and implementation of effective marketing and R&D programs. The study's major objectives include:

- To establish a comprehensive, factual, annually-updated and cost-effective information base on performance, capabilities, goals and strategies of the world's leading pharmaceutical companies.
- To help current suppliers realistically assess their financial, marketing and technological capabilities vis-a-vis leading competitors.
- To assist potential market entrants in evaluating prospective acquisitions and joint venture candidates.
- To complement organizations' internal competitor information gathering efforts by providing strategic analysis, data interpretation and insight.
- To identify the least competitive market niches with significant growth potential.

Study Content

WORLDWIDE MARKET DYNAMICS AND TRENDS

The study will provide an approximately **50-page** worldwide strategic overview of the pharmaceutical market, including sales forecasts for:

- Major product segments: ethical, OTC, generics.
- Key geographic regions: North America, Europe, Japan, and Latin America.
- Major drug categories, including cardiovascular, gastrointestinal, antibiotic, CNS, respiratory, musculoskeletal, hormonal/genitourinary, dermatological, oncological, ophthalmic, and others.

In addition, the report reviews major U.S. and international regulatory, technological, economic, demographic, and social trends with potentially significant impact on the pharmaceutical industry during the next five years, including discussion of such key issues as pricing, industry consolidation, market globalization, growing R&D cost, generics, as well as advances in genomics, proteomics, drug screening, tissue engineering, bioinformatics, and other technologies.

COMPANY STRATEGIC ASSESSMENTS

The following companies have been selected as the **Top 10** suppliers with highest worldwide sales of pharmaceutical products:

- | | |
|---------------------|------------------|
| • Abbot | • Merck |
| • AstraZeneca | • Novartis |
| • Eli Lilly | • Pfizer |
| • GlaxoSmithKline | • Roche |
| • Johnson & Johnson | • Sanofi-Aventis |

The report provides the following information:

SECTION I: EXECUTIVE SUMMARY

- A 5-10 page synopsis of key sections.

SECTION II: BUSINESS ORGANIZATION

- History of the company's pharmaceutical business evolution, which is important to understanding the corporate culture, management mentality, and strategies.
- Most recent M&A activity and significant organizational changes.
- Current organizational structure.

SECTION III: SENIOR MANAGEMENT

- Names, titles, and background of senior managers.

SECTION IV: FACILITIES AND EMPLOYEES

- Major administrative, manufacturing, and R&D facilities in the U.S. and abroad.
- Manufacturing practices.
- New plants under construction.
- U.S. and international work force size and distribution.

SECTION V: TECHNOLOGICAL KNOW-HOW

- Internally developed and acquired technologies, processes, and related capabilities.
- Know-how in biotechnology and other pertinent fields.
- Proprietary technologies and patent litigations.

SECTION VI: PRODUCT PORTFOLIO ANALYSIS

- Extensive review of major ethical, OTC, and generic drugs.
- Most recent new drug introductions and indications.

SECTION VII: MARKETING TACTICS

- Sales force in the U.S., Europe, and other regions.
- Distribution strategies.
- Major promotional tactics.

SECTION VIII: FINANCIAL ANALYSIS

- The U.S. and international sales and operating profit estimates by division, geographic region, therapeutic category, and individual drug.
- The five-year sales and operating profit performance.

SECTION IX: R&D EXPENDITURES AND MAJOR PROGRAMS

- The R&D budget.
- Research facilities and staff.
- New technologies, drugs, and indications in development, including their phase and anticipated introduction dates.
- Worldwide sales force size.

SECTION X: COLLABORATIVE ARRANGEMENTS

- Major joint venture, distribution, OEM, and licensing partners, both industrial and academic.
- Terms of collaborative agreements and specific products involved.

SECTION XI: STRATEGIC DIRECTION

- Major strengths and weaknesses.
- Business, new product development, and marketing objectives and strategies.
- Anticipated acquisitions, joint ventures, and divestitures.

COMPARATIVE ANALYSIS

In this section of the report, the Top 10 companies are ranked according to the following criteria:

- Worldwide sales and rank products.
- Operating profit and margins.
- R&D expenditures.

Methodology

VENTURE PLANNING GROUP'S DATABASE

VPG's proprietary data files contain current information on major pharmaceutical companies, technologies, products and executives worldwide. These files, developed in the course of over 100 syndicated and numerous single-client studies, were thoroughly searched to retrieve any information pertinent to the **Top 10** companies' capabilities and strategies.

SECONDARY INFORMATION SOURCES

A comprehensive review of the Top 10 companies' product and financial literature, business and technical periodicals, and pertinent industry analyst reports was conducted.
