The Specialty Pharmaceutical Market Outlook

Key players, opportunities and future trends

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About us

Business Insights’ portfolio of healthcare reports is designed to help you make well informed and timely business decisions. We understand the problems facing today's pharmaceutical and healthcare executives when trying to drive your business forward, and appreciate the importance of accurate, up-to-date, incisive product, market and company analysis. We help you to crystallize your business decisions.

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Report overview

‘The Specialty Pharmaceuticals Market Outlook’ is a new Business Insights report which provides key information on market dynamics, leading players and key therapy areas of opportunity for specialty pharma companies. Market drivers include increasing reimbursement from national health bodies and governments, industry consolidation, big pharma divestments and biotech growth. Resistors including increased competition, big pharma entry to specialty markets and the financial crisis are also examined in the context of industry strategies of licensing deals, product acquisitions and orphan drug development. Ten leading players are profiled including an analysis of current products, drug pipelines and threats from patent expiries.

The effects of industry trends such as rising costs, and generic erosion are analyzed and developed into an outlook for the future of the specialty sector, including strategies for future success.

Pages 100
Figures 20
Tables 23

This report sizes the specialty pharmaceutical market and makes quantitative forecasts to 2014. It also analyzes the effects of wider pharmaceutical industry trends on specialty players.

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Key findings

The specialty pharmaceutical market is estimated at $116bn in 2010 and is forecast to grow to $141bn by 2014.

In 2008, specialty pharma companies accounted for 15% of global pharmaceutical sales and 40% of sales not accounted for by big pharma companies.

Central nervous system, anti-infective, cardiovascular and ophthalmology were the largest specialty pharma therapy areas in 2008.

Industry pressures on large diversified pharma companies are having a knock-on effect on the specialty sector in the form of increased competition for licensing deals.

Easing credit conditions will give rise to a further wave of consolidation, with specialty players likely to become acquisition targets.

Use this report to...

- Assess leading players in the specialty sector.
- Understand the drivers and resistors of the specialty pharmaceutical market.
- Gain an insight into key market strategies such as in-licensing, acquisitions and orphan drug development.
- Determine therapy areas of rich opportunity which are well suited to the specialty pharma business model.
- Develop strategies for success in the future specialty pharma market.

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Key issues...

- Which therapy areas and indications have suitable dynamics for the specialty pharmaceutical business model?

- How is the financial crisis affecting the specialty pharma industry?

- Competition for licensing deals is increasing as big pharma companies rush to fill their pipelines.

- Healthcare reform is set to have wide ranging effects on the largest pharmaceutical market in the world.

- A further round of pharma industry consolidation will impact the specialty pharmaceutical industry.

Discover...

- What is outlook for specialty pharma companies and therapeutic markets to 2014?

- What are the drivers and resistors of the specialty pharma market?

- What are the leading players in the specialty pharmaceutical sector?

- What indications and therapy areas are most ripe for entry by specialty pharma companies?

- What strategies will be successful in the future specialty pharmaceutical market?

Fig 2.5: Opportunity against requirement for innovation by therapy area

"Therapeutic areas vary in the level of innovation required for new products. Scale is a key factor when attempting to negotiate partnering deals with drug discovery and biotech companies. High market opportunity areas are likely to suffer from strong competition from big pharma companies, except in niche indications. Indications with low to mid range market opportunity and medium to high requirements for innovation are best suited to the typical specialty player..."
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