



By Carolyn Gretton

▶ Long-Term Planning Tactics

Key to Maintaining Portfolio Health

TREND: Continued pressures on the pharmaceuticals market are driving companies to become more rigorous and forward-focused when it comes to product portfolio management.

Mapping out portfolio management options earlier in the life cycle provides pharmaceutical companies with both more strategic paths and better results.

“In our most recent study, a senior director at a top 50 pharma company reported that his portfolio management team regularly reviews its long-term options, planning at least 10 years down the road,” says Jeremy Spivey, senior research analyst at Cutting Edge Information. “By diversifying tactics and casting a wider net, companies can give themselves more chances for success.”

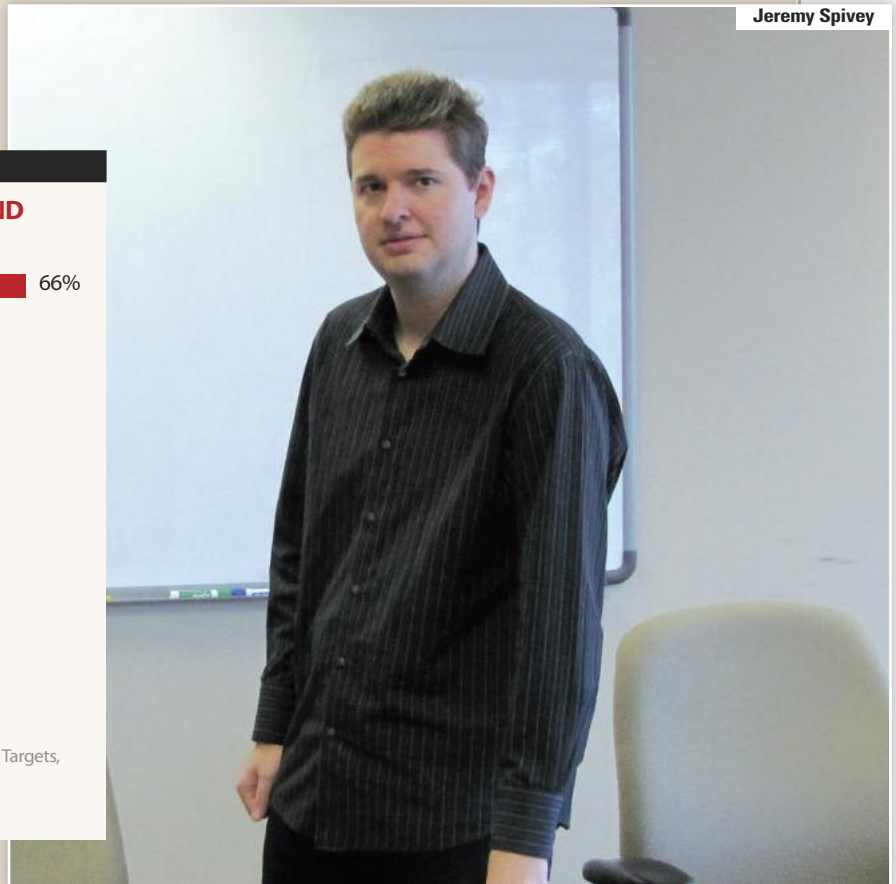
The recent Cutting Edge Information report, *Pharmaceutical Portfolio Management: Selecting Targets, Filling Pipelines and Preparing for Post-Launch Success*, emphasizes the importance of having backup tactics in place, since many portfolio strategies rely on the nuances of regulatory approvals and rulings.

Some long-term options recommended to maintain a successful portfolio and healthy revenue stream include:

- » Line extension strategies, which serve to delay patent expiry
- » Exclusivity extension techniques, which extend the time products have the market to themselves
- » Market crossover tactics, which attempt to best bridge the switch from branded drug to generic
- » Counter-promotion, which serves to keep the brand fresh in the minds of physicians and consumers
- » Strategic pricing, which is chosen in response to competitors on — or soon to be on — the market

▼ For more information, visit cuttingedgeinfo.com.

Jeremy Spivey



GROUPS RESPONSIBLE FOR ALIGNING BRAND AND CORPORATE STRATEGY



Source: Cutting Edge Information, *Pharmaceutical Portfolio Management: Selecting Targets, Filling Pipelines and Preparing for Post-Launch Success*. For more information, visit cuttingedgeinfo.com.

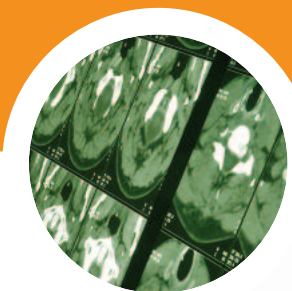
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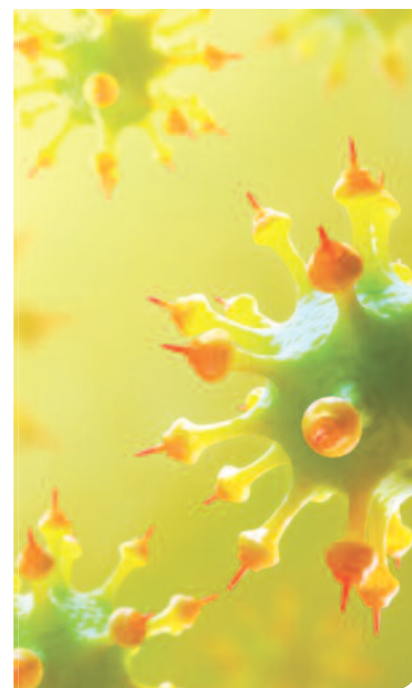
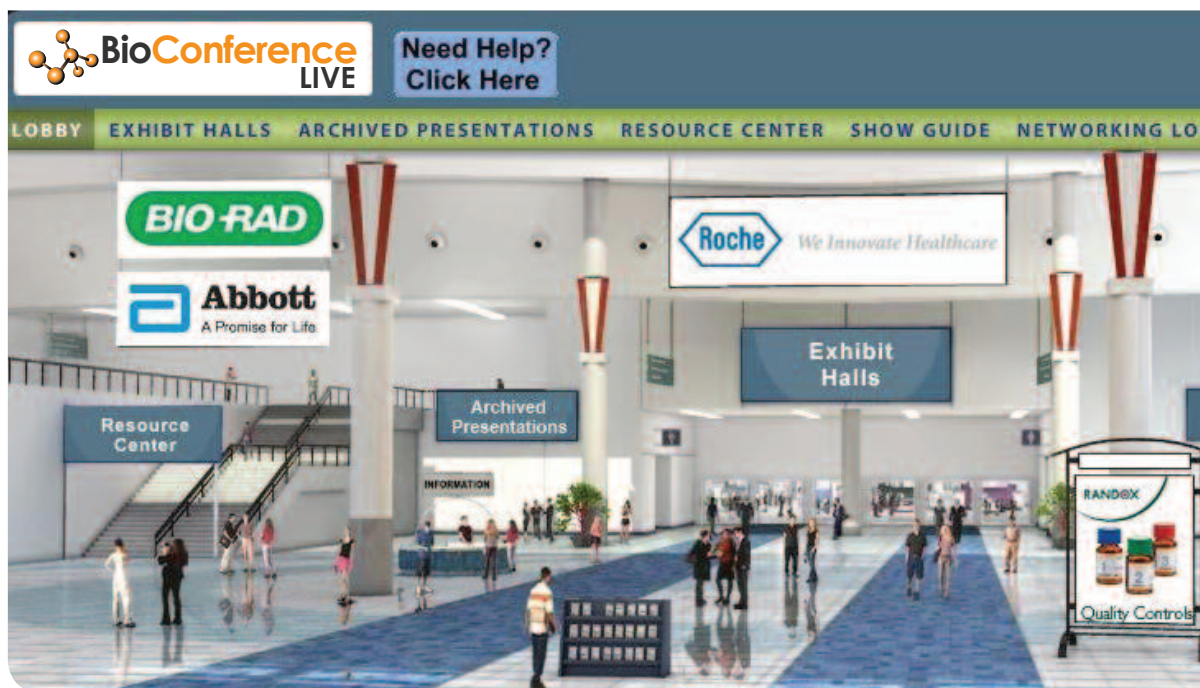
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THERAPEUTIC FAST TRAX... **ANTIVIRAL**

Six months postlaunch of Vertex's Incivek (telaprevir) and Merck/Roche's Victrelis (boceprevir), specialists report a significant increase in usage of both products in their genotype 1 hepatitis C virus (HCV) patients compared with one month postlaunch. Incivek remains the market share leader, though the gap in preference for Incivek over Victrelis is beginning to narrow compared with previous waves of research. Surveyed hepatologists reported using significantly more Incivek than infectious disease specialists.

Source: BioTrends Research Group, LaunchTrends:Victrelis (boceprevir) and Incivek (telaprevir) Wave 3.

▼ For more information, visit bio-trends.com.

A recent poll of nurse practitioners (NPs) and physician assistants (PAs) focused on management of patients with hepatitis C virus (HCV) revealed that 63% of NPs and PAs did not routinely screen patients for HCV, and only 35% were very confident in identifying at-risk patients who would benefit from screening. About 82% of respondents expressed interest in continuing education activities specifically on HCV.

Source: Practicing Clinicians Exchange quick poll.

▼ For more information, visit practicingclinicians.com.

CANCER

The Russian market for non-small-cell lung cancer therapies is projected to grow at 3% from 2010 to 2015, reaching \$163 million in 2015. Growth is expected to be driven by an increase in the incident population, gradually increasing use of higher-priced chemotherapies, and the introduction of several premium-priced agents.

Source: Decision Resources, Emerging Markets report, Non-Small-Cell Lung Cancer in Russia.

▼ For more information, visit decisionresources.com.

The acute myeloid leukemia therapeutics market in G8 countries was valued at about \$216 million in 2010 and is expected to post a compound annual growth rate (CAGR) of 28.4% from 2015 to 2020. The market was dominated by AVD regimen in 2010, with the category accounting for roughly 54% of the acute myeloid leukemia therapeutics market in G8 countries. In 2020, the market is expected to be dominated by AVD regimen, cytarabine drug, and quizartinib molecule, with sales forecast at \$698 million, \$285 million, and \$234 million, respectively.

Source: MarketsandMarkets, Acute Myeloid Leukemia Therapeutics Market in G8 Countries (2010 - 2020).

▼ For more information, visit marketsandmarkets.com.

CARDIOVASCULAR

Based on anticipated uptake of novel stem-cell therapies projected to launch in 2016, the drug market for peripheral arterial disease is forecast to increase from \$3.2 billion in 2010 to \$4.3 billion in 2020 in the United States, France, Germany, Italy, Spain, the United Kingdom, and Japan. Stem-cell therapy has the potential to revolutionize the treatment of peripheral arterial disease patients with critical limb ischemia, with three novel stem-cell therapies expected to account for nearly 40% of total sales in the indication in 2020.

Source: Decision Resources, Pharmacor findings on Peripheral Arterial Disease.

▼ For more information, visit decisionresources.com.

The combined markets for drugs used in the treatment and prophylaxis of venous thromboembolism will experience moderate growth over the next decade, increasing from \$3.4 billion in 2010 to \$4.7 billion in 2020 in the United States, France, Germany, Italy, Spain, the United Kingdom, and Japan. The market will likely be driven primarily by the launches and strong uptake of oral anticoagulants, with Bayer/Janssen's Xarelto expected to emerge as the sales-leading new therapy in the combined VTE markets and its closest competitor to be Bristol-Myers Squibb/Pfizer's Eliquis. But despite the widespread use of these two agents, sales of Xarelto and Eliquis will be constrained by the negative clinical trial results that were announced earlier this year for VTE prophylaxis in medically ill patients.

Source: Decision Resources, Pharmacor findings on Venous Thromboembolism.

▼ For more information, visit decisionresources.com.

One of the most promising areas in cardiology is a new wave of anticoagulants that could change the course of therapy for stroke and other clot patients. Key front-runners include Pfizer and Bristol-Myers Squibb's Eliquis, Johnson & Johnson's Xarelto, Boehringer Ingelheim's Pradaxa, and Daiichi Sankyo's edoxaban. Although at varying stages of development, clinical trial data puts these agents collectively on a track to replace warfarin, the current oral anticoagulant standard-bearer.

Source: inThought, Innovative Medicine Shaping the Cardiology Market: Reviewing AHA and Looking Ahead.

▼ For more information, visit in-thought.com.

GASTROINTESTINAL

From 2010 to 2020, the Crohn's disease drug market is expected to experience modest annual growth of about 3% in the United States, France, Germany, Italy, Spain, the United Kingdom, and Japan. Sales of the dominant market brands, Janssen Biotech/Merck/Mitsubishi Tanabe's Remicade and Abbott/Eisai's Humira, are projected to peak at \$3.3 billion in 2015, because of increasing physician familiarity with these agents and continuing emergence of favorable postmarketing clinical trial data. But sales will be tempered starting in 2016 following the entry of biosimilar TNF-alpha inhibitors to the Crohn's disease market.

Source: Decision Resources, Pharmacor findings on Crohn's Disease.

▼ For more information, visit decisionresources.com.

Because of market entry of a few high-priced but much-needed first-in-class therapies, the irritable bowel syndrome (IBS) drug market is forecast to increase from \$610 million in 2010 to \$2.7 billion in 2020 in the United States, France, Germany, Italy, Spain, the United Kingdom, and Japan. Some of these therapies affect not only motility but also pain, which remains one of the biggest unmet needs for IBS patients and the physicians who treat them.

Source: Decision Resources, Pharmacor findings on Irritable Bowel Syndrome.

▼ For more information, visit decisionresources.com.

LIVER DISEASE

Total revenue for liver disease drugs was valued at an estimated \$12 billion in 2011. This market is expected to grow at a CAGR of 3.3% to reach almost \$14.2 billion in 2016. The U.S. region accounted for \$4.2 billion in 2011, and after increasing at a CAGR of 3%, should surpass \$4.9 billion in 2016.

Source: BCC Research, Liver Disease Treatments: The Global Market.

▼ For more information, visit bccresearch.com.

LUPUS

At six months postlaunch, more than half of surveyed rheumatologists have initiated trial on Benlysta, up from 36% at three months post-launch and significantly higher than 25% at one

month postlaunch. One of the most notable shifts in prescribing since one month postlaunch is a significant increase in current Benlysta shares for the moderate and severe lupus patient groups.

Source: BioTrends Research Group, LaunchTrends: Benlysta Wave 3.

▼ For more information, visit bio-trends.com.

RESPIRATORY

The global pulmonary drug delivery technologies market was estimated at \$19.6 billion in 2010 and came in at around \$22.5 billion by 2011. The global market is further projected to reach almost \$44 billion by 2016 at a compound annual growth rate (CAGR) of 14.3%. The metered dose inhalers (MDIs) category is expected to grow to \$29.8 billion by 2016 at a CAGR of 15.7%, while the dry powder inhalers (DPIs) segment is expected to reach \$13.4 billion by 2016 at a CAGR of 12.3%.

Source: BCC Research, Pulmonary Drug Delivery Systems: Technologies and Global Markets.

▼ For more information, visit bccresearch.com.

STROKE

The global acute ischemic stroke therapeutics market was valued at an estimated \$256.5 million in 2010, and is expected to increase at a CAGR of 16.7% to about \$880 million by 2018. This strong growth is primarily attributed to the expected launch of three drugs: desmoteplase, a plasminogen activator; RG3626, an extended timeframe formulation of alteplase; and DP-b99. These drugs have a higher therapeutic time frame and can be given to a stroke patient even after three hours of the onset of stroke, unlike the current formulation of Activase (alteplase).

Source: GlobalData, Acute Ischemic Stroke (AIS) Therapeutics — Pipeline Assessment and Market Forecasts to 2018.

▼ For more information, visit globaldata.com.

VACCINES

The global vaccine market is likely to be worth an estimated \$27.6 billion by the end of 2011 because of high growth in emerging markets, technological advancements, strong support from government and other active associations like WHO and GAVI, and increased investment in research activities. With the successful launch of new vaccines expected in the coming years for key indications, the market for vaccines is projected to hit \$33 billion by 2013.

Source: RNCOS, Global Vaccine Market Forecast to 2013.

▼ For more information, visit rncos.com.

Other market insights...

Brand Positioning Should Balance PR, ROI

The value of PR can seem immeasurable in brand positioning, yet in an age of budgetary juggling by marketing departments, the drive to scrutinize return on investment (ROI) is increasingly important.

In its report, *Pharmaceutical Brand PR: Developing Engaging Campaigns and Measuring ROI*, FirstWord Dossier observes that as expectations on PR outcomes increase, in part due to social media, its role is broadening. Through social media, PR has become increasingly sophisticated to position brands across multiple channels and audiences. Also, a trend toward using key performance indicators to measure previously difficult-to-define notions of success is emerging.

▼ For more information, visit firstwordplus.com.

MSL Role Continues to Evolve

Medical science liaisons (MSLs) forge relationships with key opinion leaders that provide critical insights into the market and competition, but the changing regulatory and access environment has altered the landscape for creating and maintaining these relationships.

In its updated MSL-focused report, *Roles, Resources and Management of Medical Science Liaisons*, Best Practices found that companies are having managers oversee a greater number of MSLs than they did previously. In 2011, 57% of respondents preferred to have one manager overseeing seven to 10 specialists, whereas in 2009, the preferred span of control was one manager for up to six specialists, with 47% of respondents citing this arrangement.

▼ For more information, visit best-in-class.com.

Website Access Chief Internet Use Among NPs, PAs

In a recent survey of nurse practitioners (NPs) and physician assistants (PAs), the Practicing Clinicians Exchange (PCE) found NP and PA Internet usage has increased by 80% in the last five years, especially for medical information and continuing education (CE) purposes. About 90% of NP and PA respondents report accessing websites for medical education, with 67% registering for emails and newsletters. Another two-thirds of respondents say


they use the Internet to acquire up to half of their CE credits.

▼ For more information, visit practicingclinicians.com.

More Effective Brand Messaging

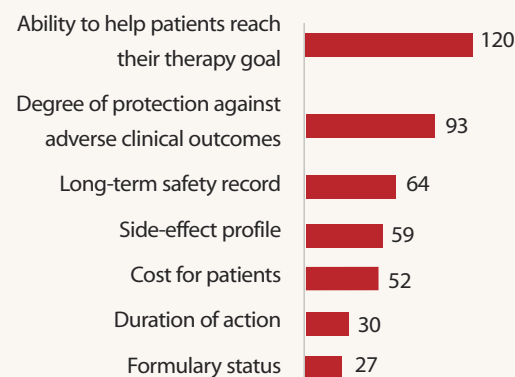
Pharma executives are clearly facing a wide range of challenges, including the intense efforts of managed-care companies to contain costs and the long, difficult road toward producing next-generation products. But, the Boston Consulting Group observes, commercial teams often create their own headaches by focusing too heavily on physicians as the decision-makers and fail to identify the best target patient population for their brands.

The BCG report, *Brand Renaissance: Five Ways to Win Commercially in the U.S. Pharmaceutical Market*, notes that understanding the true drivers of physician decision-making is key to realizing more effective brand messaging and market share gains. The report also advises pharma commercial teams to learn from the consumer goods market to become more skilled at identifying the most critical sales drivers and allocating resources to them throughout a product's life cycle.

▼ For more information, visit bcg.com. 

IMPORTANCE OF PRODUCT ATTRIBUTES IN BRAND RATING

Product attributes



Weighted importance of product attributes in a particular disease category, on a scale of 0 to 150

Source: Boston Consulting Group, *Brand Renaissance: Five Ways to Win Commercially in the U.S. Pharmaceutical Market*. For more information, visit bcg.com.