

SCIENTIFIC SPLASHDOWN

## Pharma Provides Robust Level of Information

According to its most recent quarterly review of scientific literature on drugs and therapies, Thomson Scientific reported that Novartis gained pole position knocking GlaxoSmithKline out of the top spot for the first time since June 2006.

Researchers affiliated with Novartis issued 82 articles, abstracts, or scientific posters between April and June 2007, more than the 73 identified in the previous quarter.

Thomson assesses the quantity and quality of the materials published by pharmaceutical companies, research institutions, and other noncommercial entities on a quarterly basis to identify the organization that is making the biggest splash.

From April 2007 to June 2007, the three other companies at the top of the list were: AstraZeneca, Eli Lilly, and GlaxoSmithKline.

SOURCE: THE THOMSON CORP., PHILADELPHIA



Eisai commemorates the opening of a newly constructed U.S. corporate headquarters in Woodcliff Lake, N.J. Pictured are (left to right): Hajime Shimizu, President, Eisai Corp. of North America and Chairman and CEO, Eisai Inc.; Joe LaPaglia, Mayor, Borough of Woodcliff Lake; Jon S. Corzine, Governor, State of New Jersey; Soichi Matsuno, Deputy President and Executive Officer, Eisai Co. Ltd.; Ambassador Motoatsu Sakurai, Consulate General of Japan in New York; Billy Tausin, President and CEO, PhRMA; Peter J. Cocozziello, President and CEO, Advance Realty Group; and Lonnel Coats, President and Chief Operating Officer, Eisai Inc.

### NEW HEADQUARTERS

## Eisai Dedicates U.S. Office

Executives from the Eisai organization gathered recently to celebrate the opening of the new U.S. corporate headquarters in Woodcliff Lake, N.J.

The three-story facility provides Eisai with 209,000 square feet of space and capacity for more than 700 people to accommodate its ongoing expansion and anticipated future growth.

The new office supports other Eisai efforts in the United States, such as a new 65,000-square-foot facility for future production and R&D formulation of oncology products in Research Triangle

Park, N.C., and the addition of a 150,000-square-foot, basic discovery research facility at Eisai Research Institute of Boston Inc. in Andover, Mass.

Eisai Corporation of North America, which provides services and oversight to all Eisai U.S. companies, and Eisai Inc., a top-20 U.S. pharmaceutical company, are both subsidiaries of Tokyo-based Eisai Co. Ltd. of Japan.

SOURCE: EISAI INC., WOODCLIFF LAKE, N.J.

### FAST FACTS

## The Industry at a Glance

The global pharmaceutical market is expected to grow at a 5% to 6% pace next year, compared with 6% to 7% in 2007. IMS Health's 2008 Global Pharmaceutical Market and Therapy Forecast predicts global pharmaceutical sales will expand to \$735 billion to \$745 billion next year.

- Growth contribution from the

top seven markets falls. In the U.S. and the five largest European markets, sales growth in 2008 is expected to range from 4% to 5%; and in Japan from 1% to 2%.

- Patient use of innovative specialty products expands. Up to 29 innovative new medicines will be launched in 2008, 80% of which will be primarily prescribed by specialists. Overall growth in the audited specialty-driven market is forecast to grow between \$295 billion and

\$305 billion, reflecting 14% to 15% growth next year.

- "Pharmerging" market growth accelerates. The seven "pharmerging" markets of China, Brazil, Mexico, South Korea, India, Turkey, and Russia are expected to grow 12% to 13% next year, to between \$85 billion and \$90 billion.
- Wave of genericization continues. Drugs with \$20 billion in annual sales will face patent expiry in 2008, similar to levels witnessed over the past two years.

### Key Market-Shaping Dynamics:

- Drug treatment costs decline in major therapy areas
- Shift in growth from top seven markets to emerging markets, and from primary care to specialty care
- Increased uncertainty over safety, pricing and market access, and intellectual property issues

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## LAW & DISORDER Litigation Landscape

Fulbright & Jaworski LLP reports that 90% of healthcare companies faced at least one new lawsuit last year, more than almost all other industry groups tracked. Nearly one-quarter (24%) of health providers had to defend more than 20 new actions. And 40% of U.S. healthcare companies surveyed reported at least one \$20 million action against them.

Litigation has obviously become a major line item in healthcare company budgets. Almost one-quarter (22%) of the healthcare firms report that they spent at least \$5 million on litigation, excluding costs of settlements and judgments, while just more than one-half (52%) reported spending more than \$1 million per year on business disputes.

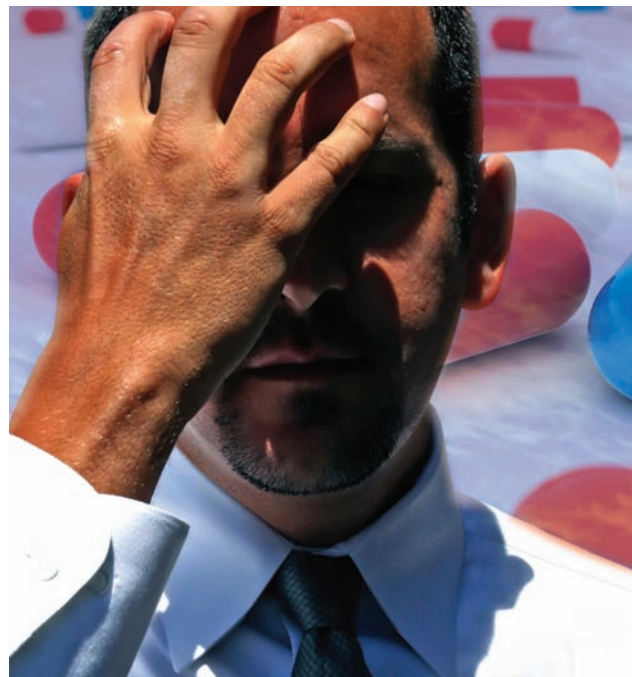
Healthcare companies' in-house law departments reported labor and employment matters (47%) were their biggest concern, followed by professional services (38%), and personal injury (34%).

### Key Survey Findings

- **73% of healthcare companies** do not let their employees use outside e-mail accounts on company-issued computers; **38% of companies** allow employees to use instant messages. Both totals are among the lowest of any industry.
- **52% of healthcare companies** report an increase in external regulatory inquiries and investigations; **42% expect the number of inquiries** to increase in the future, the most of any industry and significantly higher than the U.S. average.
- **52% of healthcare companies** filed at least one suit acting as plaintiff last year; **16% of companies** filed at least one suit seeking more than \$20 million.
- **44% have class actions** pending against them.
- **40% of healthcare companies**, in the past three years, have faced inquiries from the FDA and from OSHA.
- **25% of healthcare firms** expect their case load to increase next year.

## FAILING GRADE

# The Economic Cost of Low Health Literacy



The cost of low health literacy to the U.S. economy ranges from \$106 billion to \$236 billion annually, according to a report by the University of Connecticut.

According to the report, Low Health Literacy: Implications for National Health Policy, the savings that could be achieved by improving health literacy translates into enough funds to insure every one of the more than 47 million persons who lacked coverage in the United States in 2006, according to recent Census Bureau estimates.

Health literacy is defined as the degree to which individuals have the capacity to obtain, process, and understand basic health information. According to the U.S. Department of Education's 2003 National Assessment of Adult Literacy (NAAL), which contained a health literacy component for the first time, 36% of the adult U.S. population — about 87 million people — has only basic or below basic health literacy levels.

Public policy plays an important role in addressing low health literacy and its effects. Conversely, the failure to act carries high costs in terms of individual health, healthcare spending, and the economic well-being of the nation as a whole.

The report findings highlight two basic types of health policy interventions. The first is elimination of disparities in health insurance coverage. The second focuses on specific actions to improve the ways in which health insurers and healthcare providers relate to and interact with patients.

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**Featured Thought Leader:** Laurie Lucas, Founder and Principal, L3 Healthcare Marketing

- **Own It: Transforming Public Perception of Pharma through Better Sales & Marketing Practices**

**Featured Thought Leaders:** Michael Ball, Ph.D., VP of Marketing, and Paul LeVine, VP of Analytics, InfoMedics

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