

Top 60 API(s) / Top 100 Global Brands:

A Unique Analysis of the Top 60 Franchises and Products by Active Pharmaceutical Ingredient(s), Top 50 Global Brand Franchises and Top 100 Global Brands and Loss of Exclusivity in Animal Health

March 2013

Top 60 API(s) / Top 100 Global Brands is a “must-have” report for any organisation involved in the discovery, development, manufacturing supply chain or marketing and distribution of animal health products; any firm analysing or advising animal health companies; or any company considering entering the animal health sector

- This is the first and only report that identifies, quantifies and analyses the **Top 60 Franchises and Products by Active Pharmaceutical Ingredient(s)**, which account for two-thirds of the global veterinary pharmaceutical market
- This is the first and only report that identifies and quantifies the **Top 50 Global Brand Franchises and Top 100 Global Brands** in animal health, which account for one-half of the global veterinary pharmaceutical market
- This is the first and only report that analyses the **Exclusivity** status of the **Top 100 Global Brands**
- This is the first and only report that analyses the **Generic Resilience** of the **Top 100 Global Brands** post loss of exclusivity
- This report analyses the **Top 10 Animal Health companies'** brands within the Top 100 Global Brands by Product Group and Age Profile

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Table of Contents

	Page		Page
Scope	4	Part B.2	Top 100 Global Brands and Loss of Exclusivity
Objectives	5		Executive Summary
Methodology	6		Data Tables
Glossary	7		Analysis
Part A.1	Top 60 Franchises by Active Pharmaceutical Ingredient(s)	8	Part B.3
	Executive Summary	9	Top 100 Global Brands and Generic Resilience
	Data Tables	10-12	Executive Summary
	Analysis	13	Data Tables
Part A.2	Top 60 Products by Active Pharmaceutical Ingredient(s)	14	Part C
	Executive Summary	15	Top 10 Company Analysis
	Data Tables	16-17	Executive Summary
	Chart: Top 60 Products by Active Pharmaceutical Ingredient(s)	18	Bayer
	Chart: Anti-infectives by API by Sales/First Approval	19	Boehringer Ingelheim
	Chart: Parasitocides by API by Sales/First Approval	20	Ceva
	Chart: Other Pharmaceuticals by API by Sales/First Approval	21	Elanco
	Analysis	22	Merck
Part B.1	Top 50 Global Brand Franchises	23	Merial
	Executive Summary	24	Novartis
	Data Tables	25-27	Pfizer
			Vétoquinol
			Virbac

Scope

The scope of this study was to identify, quantify and analyse the leading active pharmaceutical ingredient(s) and global brands in the veterinary pharmaceutical market in 2011

The study covered Active Pharmaceutical Ingredients accounting for two-thirds of the global veterinary pharmaceutical market

The study covered Global Brands accounting for one-half of the global veterinary pharmaceutical market

The study benchmarked companies accounting for 98% of the Top 100 Global Brands by value

Objectives

1. To identify and quantify the Top 60 Franchises by Active Pharmaceutical Ingredient(s) in animal health
2. To identify and quantify the Top 60 Products by Active Pharmaceutical Ingredient(s) in animal health
3. To analyse the Top 60 Products by Active Pharmaceutical Ingredient(s) by Product Group and Age Profile
4. To identify and quantify the Top 50 Global Brand Franchises in animal health
5. To identify and quantify the Top 100 Global Brands in animal health
6. To analyse the exclusivity status of the Top 100 Global Brands in animal health
7. To analyse the availability of generics of the Top 100 Global Brands in 11 key countries
8. To analyse the Top 100 Global Brands in animal health by Product Group and Age Profile
9. To analyse and quantify the generic resilience of the Top 100 Global Brands post loss of exclusivity
10. To analyse the Top 10 companies' brands within the Top 100 Global Brands by Product Group and Age Profile

Methodology

Vetnosis has analysed the global animal health sector since 1986. Its experienced team of Analysts specialise in this sector and cover the Top 40 companies and Top 25 countries. Vetnosis also publishes a proprietary, fully-searchable online database of ca. 40,000 animal health products and veterinary medicines in 11 key country markets

We collated global brand franchise information from our company profiles published in the Animal Health Service: Premium, extended our analysis of global brands and undertook further analysis of generic companies and their portfolios

Loss of exclusivity information was derived from detailed analysis of patent databases, regulatory authorities and company publications

Generic availability was sourced from our proprietary veterinary Portfolio Analysis Tool (vPAT-Online)

Product approval year was sourced from our company profile archives, regulatory authorities, companies and veterinary Portfolio Analysis Tool (vPAT-Online)

Glossary

Active Pharmaceutical Ingredient(s) (API)	the substance(s) in a medicine intended to furnish pharmacological activity in the mitigation, treatment or prevention of disease
Anticoccidial - Ionophore	ionophore antibiotic with anticoccidial claims
Anti-infectives	are antibiotics, antibacterials and antifungals that are used to treat or control diseases of bacterial, mycoplasma or fungal origin that are not medicinal feed additives
Beta-agonists	are a class of pharmaceuticals used for increased rate of weight gain, improved feed efficiency and increased carcass leanness in livestock and poultry
Cardiovasculars	are pharmaceuticals used to treat cardiovascular disease
Ex-manufacturer net sales (final packaged pharmaceuticals)	net sales (excluding discounts, sales taxes) achieved by manufacturers of final packaged pharmaceuticals
Exclusive/Exclusivity	means a patent or other exclusivity exists
Expired	means a patent or other exclusivity has expired
First approval	year the product received its first approval in the world
Franchise by Active Pharmaceutical Ingredient(s)	is a product or group of products within a franchise based on a core active pharmaceutical ingredient(s) e.g. fipronil franchise includes fipronil and fipronil combinations
Generic	a non-proprietary product containing the same active pharmaceutical ingredient(s) as the pioneer brand post loss of exclusivity
Generic Resilience	relates to the market share retention of the pioneer brand post loss of exclusivity and subsequent introduction of generics
Global Brand Franchise / Global Brand	is a brand or group of brands within a franchise based on a core active pharmaceutical ingredient(s); a Global Brand is a specific active pharmaceutical ingredient(s)/presentation within the franchise
Global Veterinary Pharmaceuticals Market	is the market for veterinary pharmaceuticals i.e. medicinal feed additives, anti-infectives, parasiticides, other pharmaceuticals measured at ex-manufacturer net sales of final packaged pharmaceuticals
Hormones	are a class of pharmaceuticals that impact the endocrine or exocrine system
Life cycle management	the management of an active pharmaceutical ingredient(s)/asset to maximise commercial value and longevity through product development claims and line extensions
Loss of Exclusivity	is the year that patent or other exclusivity expires
Medicinal Feed Additives	are pharmaceutically active substances that are administered to the animal via the feed
NSAID	non steroidal anti-inflammatory drug
Novel API innovation	is the commercialisation of novel active pharmaceutical ingredient(s) discovered/developed by a pharmaceutical company
Other Pharmaceutical	all pharmaceuticals excluding medicinal feed additives, anti-infectives and parasiticides
Parasiticides	Parasiticides include: Ectoparasiticides which control/kill insects/arachnids; Endoparasiticides which control/kill internal parasites; and Endectoparasiticides which control/kill both internal and external parasites
Partial exclusivity	is a mixture of exclusivity in some territories but has expired in other territories
Pioneer Brand	is the first brand to be launched, which would typically include a period of exclusivity e.g. Frontline is the pioneer brand of fipronil
Pioneer Share	is the market share of the pioneer brand within the market, defined by the active pharmaceutical ingredient(s)/presentations, including all generics for the product
Presentation	is the physical presentation of the product e.g. oral solid, intramammary
Product by Active Pharmaceutical Ingredient(s)	is a product with specific active pharmaceutical ingredient(s)/presentation
Product Group	Vetnosis classification: medicinal feed additives, anti-infectives, parasiticides and other pharmaceuticals; with Product sub-Group a further level of segmentation
Prostaglandins	are a class of pharmaceuticals that have a wide impact on the physiology of the animal
Somatotropins	are a class of pharmaceuticals used for productivity enhancement in dairy cows



Part A.1 Top 60 Franchises by Active Pharmaceutical Ingredient(s)

Part A.1 Executive Summary

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Part A.1 Top 60 Franchises by Active Pharmaceutical Ingredient(s)

Rank	Active Pharmaceutical Ingredient(s) (API) Franchise	2011 Global API Franchise Market* (\$m)	Product sub-Group	2011 Global API Product Market* (\$m)	Active Pharmaceutical Ingredient(s)	First Approval
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Q. What is the difference between Global API Franchise Market and Global API Product Market?

A. The Global API Franchise Market is the sales of the franchise that the “core” API is built upon e.g. fipronil. The Global API Product Market shows the sales of any combinations with the “core” API e.g. fipronil (S)-methoprene. This is important because the API Franchise could be comprised of multiple different combination products, which may have different manufacturing requirements and/or exclusivity status and may indicate the life cycle management strategy

Q. What is the First Approval?

A. First Approval is the year that the product received a marketing authorisation in the world. It shows the age of the product and any life cycle management strategies involving combinations

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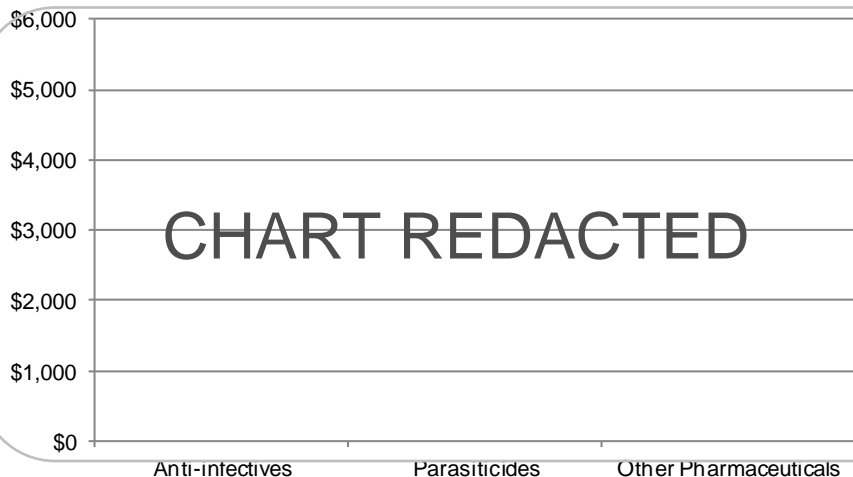
* ex-manufacturer net sales (final packaged pharmaceutical product)

Part A.1 Analysis

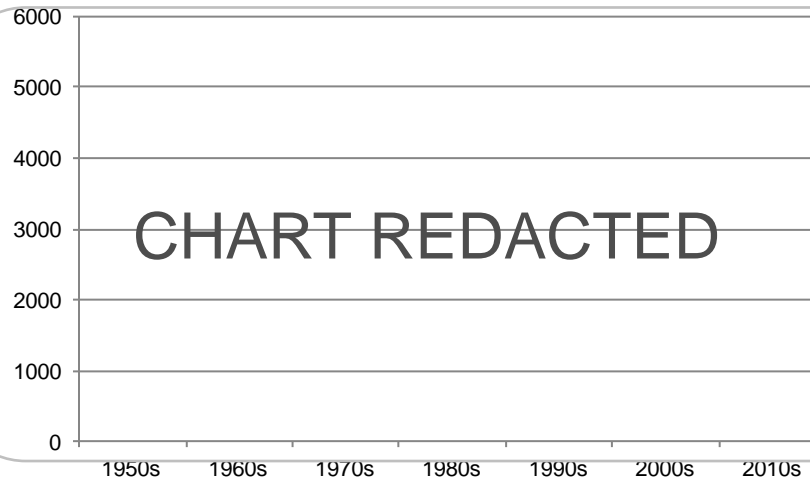
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Sales



Sales





Part A.2 Top 60 Products by Active Pharmaceutical Ingredient(s)

Part A.2 Executive Summary

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Part A.2 Top 60 Products by Active Pharmaceutical Ingredient(s)

Rank	Products by Active Pharmaceutical Ingredient(s) (API)	2011 Global API Product Market* (\$m)	First Approval
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* ex-manufacturer net sales (final packaged pharmaceutical product)

Part A.2 Top 60 Products by Active Pharmaceutical Ingredient(s)

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* ex-manufacturer net sales (final packaged pharmaceutical product)

Part A.2 Top 60 Products by Active Pharmaceutical Ingredient(s) Sales / First approval: Anti-infectives

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Part A.2 Top 60 Products by Active Pharmaceutical Ingredient(s) Sales / First approval: Parasiticides

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Part A.2 Top 60 Products by Active Pharmaceutical Ingredient(s) Sales / First approval: Other Pharmaceuticals

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Part A.2 Analysis

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Part B.1 Top 50 Global Brand Franchises

Part B.1 Executive Summary

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Part B.1 Top 50 Global Brand Franchises

Rank	Brand Franchise	Company	2011 Global Brand Franchise Sales (\$m)	Product Group	Product sub-Group	2011 Global Brand Sales (\$m)	Brand Name	API(s)	Presentation	First Approval
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* ex-manufacturer net sales (final packaged pharmaceutical product)



Part B.2 Top 100 Global Brands and Loss of Exclusivity

Part B.2 Executive Summary

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Part B.2 Top 100 Global Brands and Loss of Exclusivity

Rank	Brand Name	2011 Global Brand Sales (\$m)	Food Animal	Comp. Animal	AP1(s)	Presentation	Company	Loss of Exclusivity			Generic Status by Country									
								US	EU	Global Summary	Australia	Brazil	Canada	France	Germany	Italy	Mexico	New Zealand	Spain	UK

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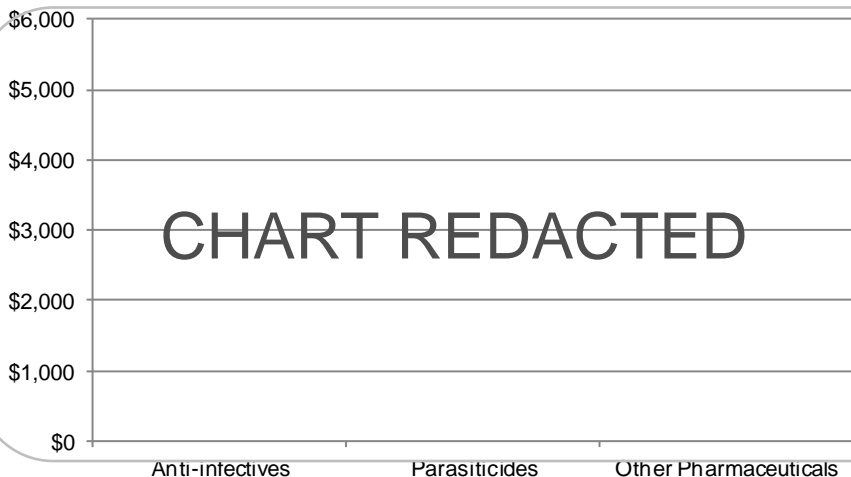
* ex-manufacturer net sales (final packaged pharmaceutical product)

Part B.2 Analysis

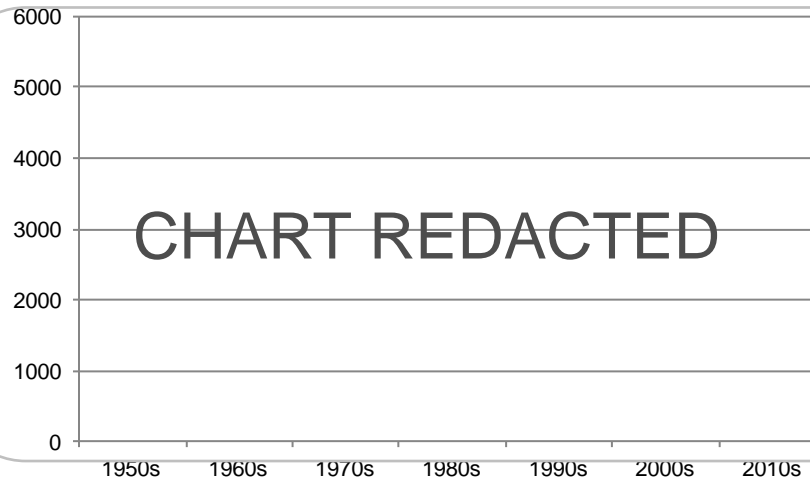
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Sales



Sales





Part B.3 Top 100 Global Brands and Generic Resilience

Part B.3 Executive Summary

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Part B.3 Top 100 Global Brands and Generic Resilience

Rank	Brand Name	2011 Global Brand Sales (\$m)	Launch Year	AP(s)	Presentation	Pioneer Company	Loss of Exclusivity		Global Summary	Generics Est. \$m	Pioneer Share
							US	EU			

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* ex-manufacturer net sales (final packaged pharmaceutical product)



Part C **Top 10 Company Analysis**

Part C Executive Summary

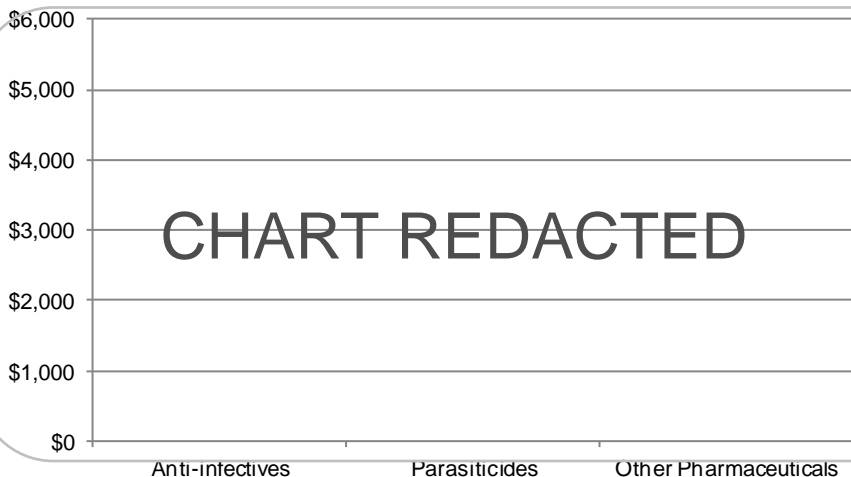
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Bayer

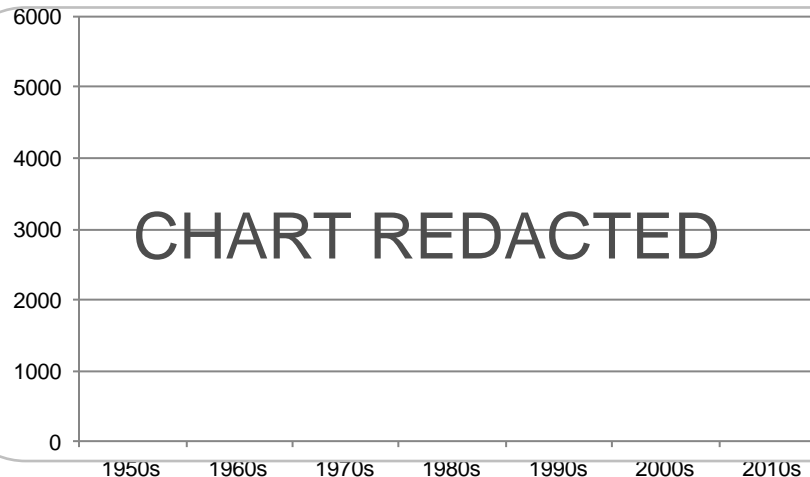
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Sales



Sales

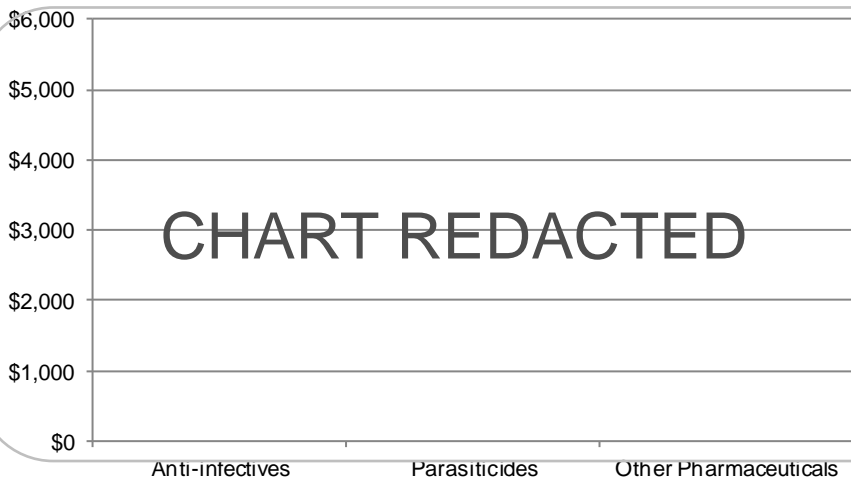


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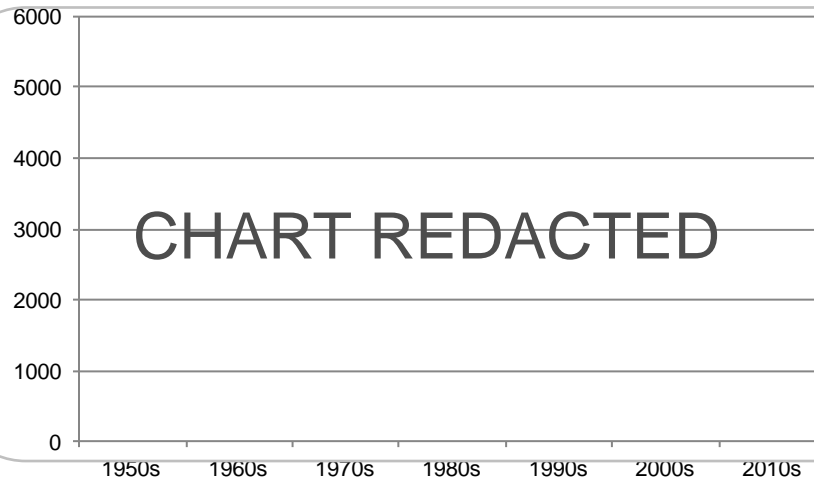
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