



Generics: Global Industry Guide

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CHAPTER 1 INTRODUCTION

This report contains easily comparable data on market value, volume, segmentation and market share for the Global Generics market, plus full five-year market forecasts. It examines future problems, innovations and potential growth areas within the market.

1.1 What is this report about?

This report is a part of Datamonitor's Global Industry Guide series, which includes comprehensive category data and analysis across all major industry sectors. These incisive reports include key data points, charts and expert analysis on a global, regional and country basis.

1.2 Who is the target reader?

This report should make essential reading for anyone involved in the Generics market globally - plus anyone considering expansion into Generics market, or targeting customers or suppliers in the market.

This report should be read by **competitive analysts, distribution managers, marketing managers, strategic planners** and **senior executives**.

1.3 How to use this report

This introductory section sets out the report style and explains the definitions used in following chapters; chapter two is a global overview of the industry; chapters three to 15 consider different country and regional markets; chapter 16 provides leading company information and chapter 17 is an appendix that details Datamonitor's research methodology.

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1.4 Definitions

The value of the generics market consists of all sales of generics drugs at ex-manufacturers prices. The market does not include animal healthcare products. Datamonitor defines a generic as a product, which is an officially approved copy of an original product whose patent has expired, marketed either as a brand or using the generic name. This definition excludes multi-source copy products that make up much of markets such as India, Spain and Italy. All currency conversions have been calculated at constant 2006 average exchange rates.

For the purpose of this report the Americas comprises Brazil, Canada, Mexico and the US.

Europe comprises Belgium, the Czech Republic, Denmark, France, Germany, Hungary, Italy, Netherlands, Norway, Poland, Russia, Spain, Sweden and the UK.

Asia-Pacific comprises Australia, China, Japan, India, Singapore, South Korea and Taiwan.

The global figure comprises the Americas, Asia-Pacific and Europe.

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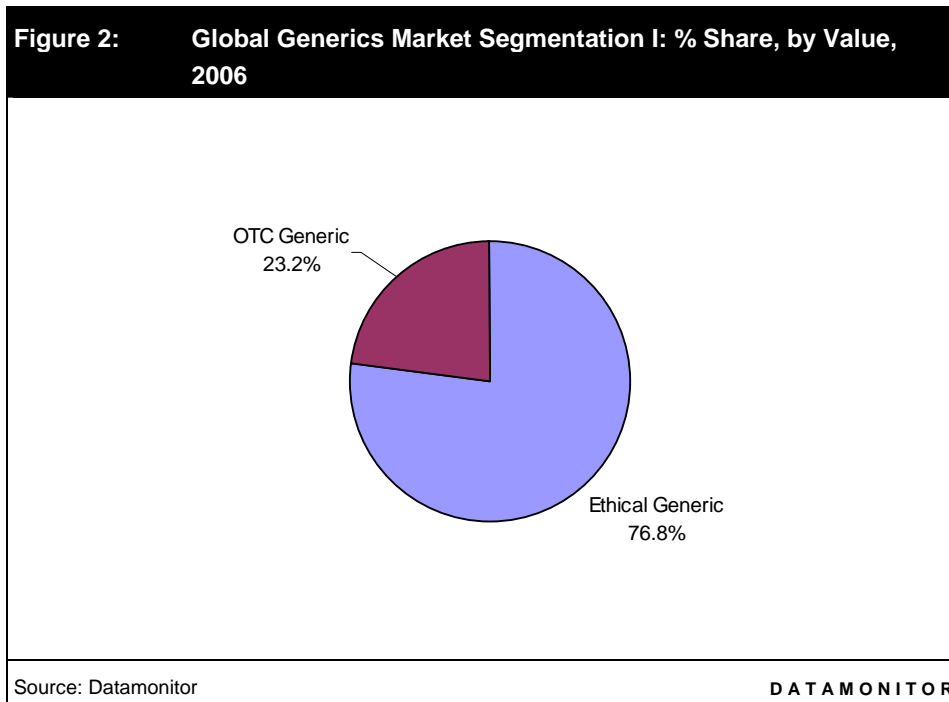
2.3 Market Segmentation I

The ethical generic segment generates 76.8% of the global market's aggregate value.

The OTC generic segment provides the remaining 23.2% of the value of the global market.

Table 2: Global Generics Market Segmentation I: % Share, by Value, 2006	
Category	% Share
Ethical Generic	76.80%
OTC Generic	23.20%
Total	100.0%

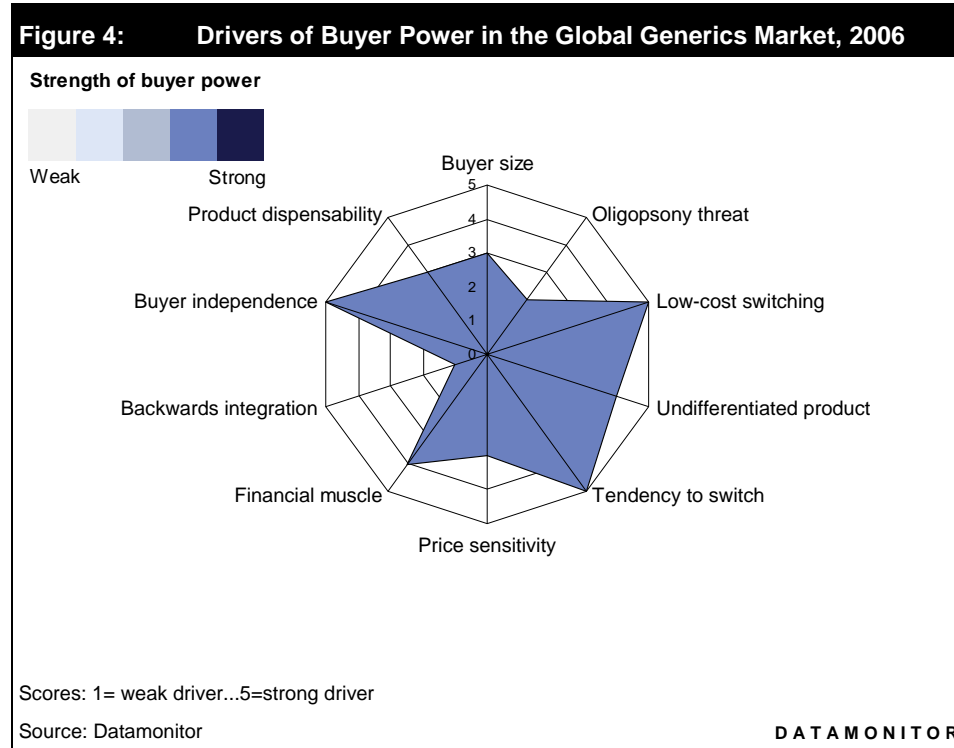
Source: Datamonitor DATAMONITOR



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2.5 Five Forces Analysis

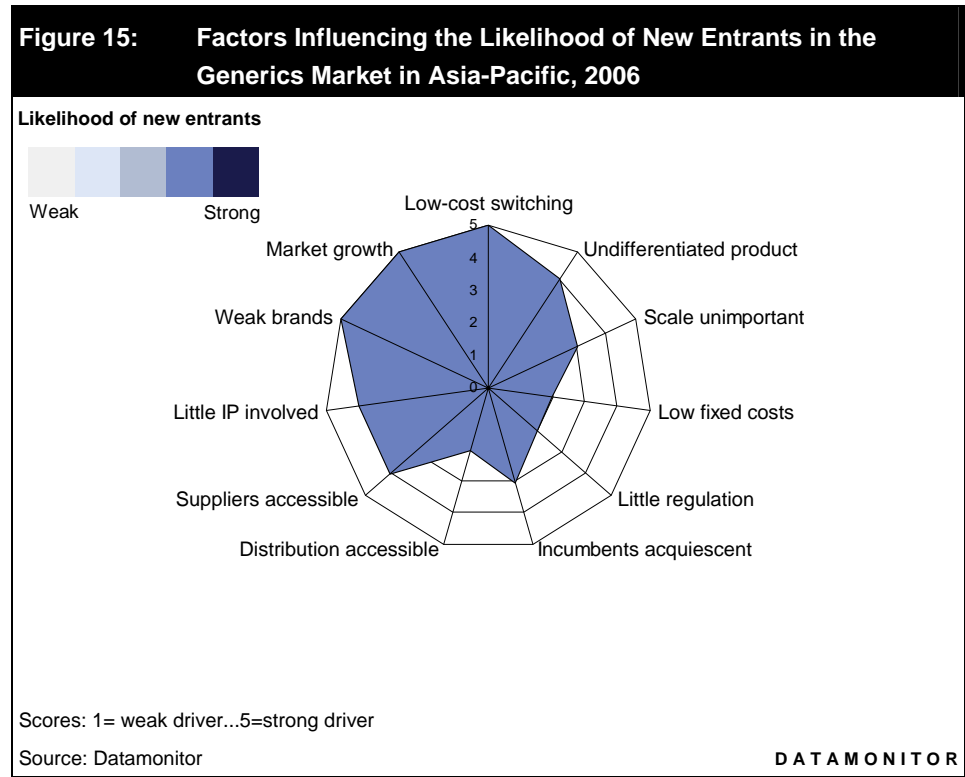
Buyer Power



The generics market will be analysed with manufacturers as players. Buyers include individual consumers, especially in the OTC generics segment, healthcare facilities, insurers, and government agencies. In some countries, governments limit the prices that can be charged by drug companies. In contrast to patented pharmaceuticals, generic drugs attract far less brand awareness, with buyers largely concerned with price and quality considerations. Switching costs for buyers are low. Many generic drugs are marketed by a number of companies, which grants buyers a high degree of choice in addition to the choice provided by alternative therapeutic agents. Overall, buyer power within the generics market is strong.

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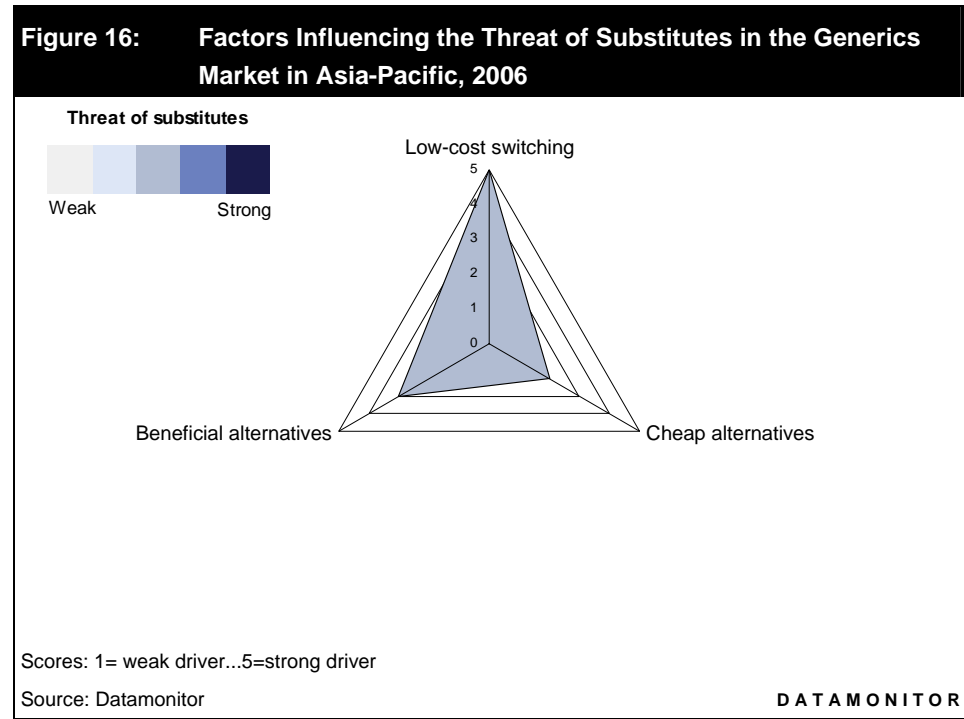
New Entrants



Due to the prohibitively high costs required for the development of novel drugs, and the relative lack of brand strength within the generics market, the entrance of new players into the manufacture of generic drugs is relatively higher than that of the pharmaceutical industry as a whole. As previously stated, the chemical synthesis capabilities of fine chemical and API manufacturers make them ideal candidates for forward integration into the generics market. However, the manufacture of generics is under strict regulation and companies must adhere to stringent good manufacturing practice and quality control standards in order to market their products within most countries, which provides a significant barrier to entry in addition to the high fixed costs required for the establishment of production facilities.

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Substitutes



Patented drugs are the main substitute threatening the generics manufacturers. In most cases, a generic is only produced after a patent has expired. This means that a research-based company has up to twenty years to develop a new therapeutic agent (that clinicians might choose despite its price if it is a genuinely more effective treatment) before its original product faces generic competition. The popularity of alternative or holistic medicines has also seen a significant increase in recent years within the general public, and traditional medicines remain in demand in some Asian countries.

Although alternative medicines are relatively inexpensive, their alleged therapeutic benefits are often hotly disputed by the medical community and lack the rigorous clinical testing and target specificity of their pharmaceutical counterparts. It should also be noted that alternative medicines present more of a significant threat to the sale of over-the-counter medicines compared to prescription medicines. Overall, the threat of substitutes is assessed moderate, but may be stronger if the price of patented drugs is regulated by governments, weaker if government policies explicitly favor generics.

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