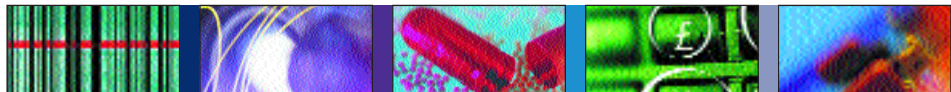


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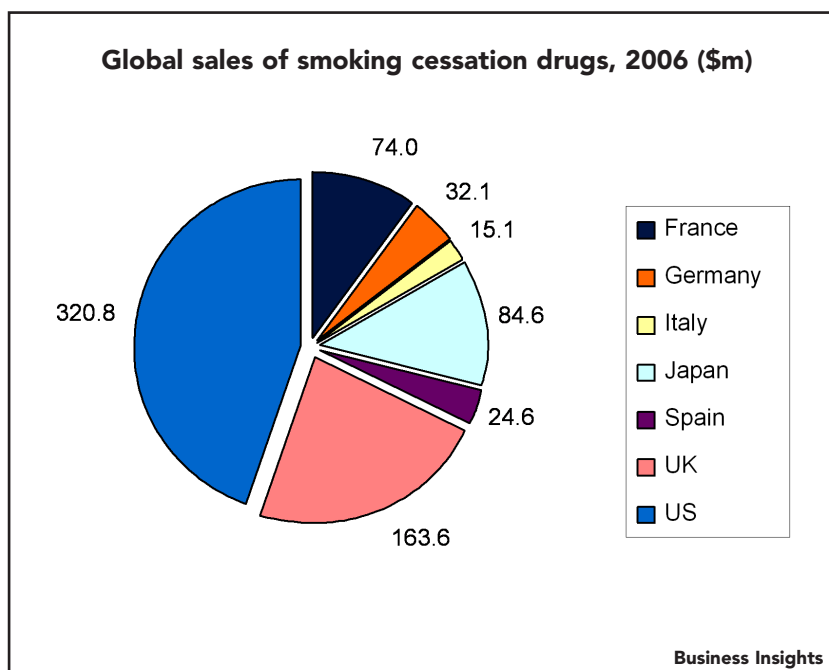


BUSINESS INSIGHTS

Lifestyle Drugs Market Outlook

Key indications, epidemiology, and emergent drugs

New Healthcare Report - Published December 2007



"The US is the largest market for smoking cessation therapies with sales amounting to \$320.8m in 2006, 44.9% of the total sales across the seven major markets. However in the first half of 2007, the US market generated revenues of \$394.0m for prescription smoking cessation therapies (ATC3 N7B)..."

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**Evaluate the prospects of current and future lifestyle therapies and
identify emerging opportunities in the global market for
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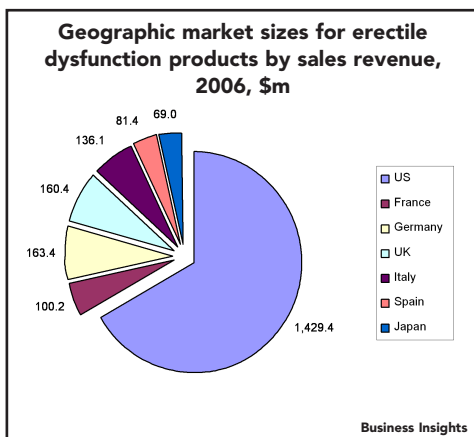
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"The US market was responsible for 66.8% of global sales in 2006, having accrued \$2,140m, a growth of 8.8% on 2005 major market sales of \$1967m. Growth was most prominent in European markets, where it reached 13% over the same annual period compared with US market growth of 7.7%, and even a decline in sales revenue for the Japanese ED market between 2005 and 2006...."

- **The global oral contraceptive market was worth \$4378.7m in 2006, of which US sales accounted for 74.7%.** The market leader **Yasmin** controlled 17% of global sales during this period, with an innovative formulation, positive side-effect profile and extended indication approval helping it to overcome high levels of competition.
- **The European and US markets for skincare had a combined value of \$6590m in 2006, and are projected to reach \$8486m by 2011.**
- **Pfizer's Champix controlled over 50% of global revenues for smoking cessation therapies by Q2 2007, despite a 2006 launch.** This rapid success has been attributed to the drug's novel formulation, high compliancy, proven efficacy and successful promotional launch.
- **The worldwide erectile dysfunction market was worth \$3203.6m in 2006, with Pfizer's Viagra commanding a share of over 50%.** Viagra sales have been falling since 2003 and will continue declining until patent expiry in 2013, however direct competition from PDE-5 inhibitors is unlikely due to Viagra's strong brand and patent strength.
- **Anti-ageing products comprise the fastest growing sector of the worldwide cosmeceutical market.** Skincare products lead the market, accounting for 80% of total US and European cosmeceutical sales.

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Lifestyle Drugs Market Outlook

The market for lifestyle drugs has become one of the most dynamic and commercially attractive sectors in the pharmaceutical industry. Prescription therapy sales for lifestyle drugs experienced growth of 3.4% between 2005 and 2006, driving total sales to \$7.8b across the seven major markets. An increase in consumer focus and expectation have enhanced the profile and demand levels of these therapies, while the gradual acceptance of lifestyle drugs amongst physicians and payors have helped to establish a recognized perception of disease prevalence. With developed markets expected to witness aging demographics as well as continued increases in health awareness, disposable incomes and pharmaceutical branding activity, conditions appear highly favourable for further growth.

Lifestyle Drugs Market Outlook is a new report published by Business Insights that provides a detailed analysis of seven individual lifestyle drug markets through the stages of drug delivery and discovery to product launch and lifecycle management. Key industrial trends in the fields of consumer demand and pipeline development are examined, leading players and products within each treatment area are profiled and the market potential of each lifestyle therapy is assessed. This report will also explore the health economics of consumer demand, with a substantial review of reimbursement policies within the seven major markets and their impact upon product sales.

Identify key market trends and growth drivers within the lifestyle drugs market, understand the pricing and reimbursement environments of global markets and evaluate the future prospects of major lifestyle drugs...

Top five reasons to order your copy today

Top 10 anti-obesity brands 2007, growth metrics

Brand	Generic	Company	Revenue (\$m)		Growth	Sales (\$m)
			2005	2006		
Xenical	Orlistat	Roche	222.2	244.6	+10%	127.4
Reductil	Sibutramine	Abbot	113.4	122	+8%	64.9
Alli	Orlistat	GSK	0.0	0.0	n/a	51.5
Acomplia	Rimonabant	Sanoofi Aventis	0.0	24.1	n/a	31.1
Adipex-P	Phentermine	Teva	22.1	17.0	-23%	8.1
Phentermine	Phentermine	Actavis	16.6	14.0	-15%	7.1
Didrex	Benzphetamine	Pfizer	14.1	12.5	-11%	5.8
Phentermine	Phentermine	Novartis	12.9	11.7	-10%	5.5
Ectiva	Sibutramine	Bracco	6.8	7.3	+8%	4.3
Amfepramone	Amfepramone	Watson	5.2	5.9	+13%	3.6
			413.8	459.5		309.6
Total Market - All Indications			471.3	482.2	+2	
Total Market - All Indications			435.8	430.6	-1.2%	

Business Insights

- **Assess the market potential of key lifestyle therapies** with this report's detailed analysis of demand and epidemiology for conditions such as **Alcohol Dependence, Alopecia, Obesity, Oral Contraception Sexual Dysfunction, Skin Aging and Smoking Cessation.**
- **Understand the major issues affecting lifestyle drug revenues across global markets** with this report's examination of consumer spend dynamics and current pricing and reimbursement environments in countries including **Japan, France, Germany, Italy, Spain, Canada, Australia, China, the US and the UK.**
- **Identify key success factors within the lifestyle drugs market** by benchmarking the successful growth strategies of leading drug developers and technological innovators.
- **Anticipate future trends and scenarios** with in-depth analysis of the main drivers and resistors to market growth in addition to the latest innovations in lifestyle drug development, dosing and delivery.
- **Evaluate the best methods of obtaining reimbursement and recognition for lifestyle drugs** with this report's comprehensive review of strategic options across the seven major markets.

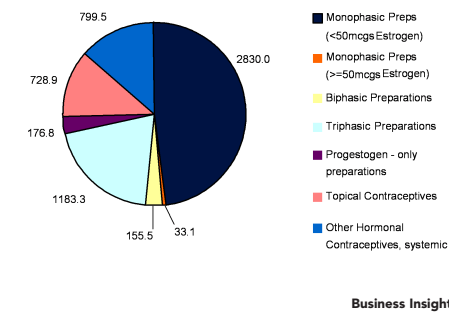
"Collectively Xenical controls 38% of the global market in terms of sales despite patent expiration. Its generic version, GlaxoSmithKline's Alli, has only been available on a prescription-basis in the US market, but a European launch is expected in late 2008. Although Rx sales are recorded, Alli was approved for OTC use in June 2007, further differentiating it from higher dose Xenical, whose patent is not set to expire until December 2009. ..."

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Key issues examined in this report...

Revenues by drug class for prescription oral contraceptives (\$m), 2006; EU5, Japan, USA

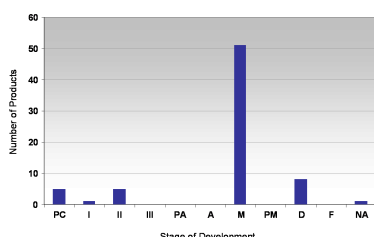


"Progesterone-only preparations have exhibited the most growth over the 2004-06 period, registering a CAGR of 10.8% across all seven major markets. This is largely due to innovations in dosing and the successful inclusion of further indications that have attracted target populations with complaints such as PMDD, PMS or acne. ..."

- **Reimbursement.** Healthcare providers are under mounting pressure to provide patient reimbursement for the cost of lifestyle drugs, particularly for anti-obesity and smoking cessation therapies. The increasingly prohibitive costs of reimbursement for related conditions have triggered the proposed policy changes.
- **Disease classification.** As lifestyle conditions increasingly become recognized as treatable diagnoses, the clarification of diagnostic criterion is accelerating the development of targeted treatments
- **Demographics.** Aging populations and rising disposable incomes in developed countries are expected to have a positive impact on lifestyle therapy revenues as consumers become more informed and financially able to treat symptoms associated with lifestyle diseases.
- **Chronic therapy use.** With many lifestyle conditions requiring long-term therapy commitments for optimal results, organizations are striving to develop safer and more affordable drugs that can improve levels of patient compliance.

Your questions answered...

Pipeline for alopecia therapies, 2007



LEGEND
 PC-- Pre-Clinical
 I-- Phase one
 II-- Phase two
 III-- Phase three
 PA-- Pending Approval
 M-- On the Market
 PM-- Post Marketing Trials
 D-- Discontinued
 F-- Failed
 A-- Approved
 NA-- No Details found (or) At Research Stage

"Neosil, Inc announced positive phase IIa clinical results in January 2007 demonstrating that its lead product, NEOSH101, increased hair growth significantly in men diagnosed with androgenetic alopecia. NEOSH101 is a proteasome inhibitor (PSI) which stimulates dormant hair follicles, increases hair follicle thickness, and overall hair growth.."

- How are lifestyle conditions defined, recognized, measured and diagnosed by physicians?
- What are the key issues currently influencing consumer demand?
- Which strategies can extend patent protection and maximize revenue potential most effectively?
- What are the major current pricing and reimbursement issues prevalent within the seven major markets?
- Which strategies can successfully secure reimbursement approval?
- What are the most promising pipeline therapies currently in development?
- To what extent will new therapies impact the lifestyle drugs market?
- How will patent expirations impact pricing, competition and brand revenues across the seven major markets?

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Sample Information: 'Lifestyle Drugs Market Outlook'

Chapter 2: Oral Contraception

Promotional spend

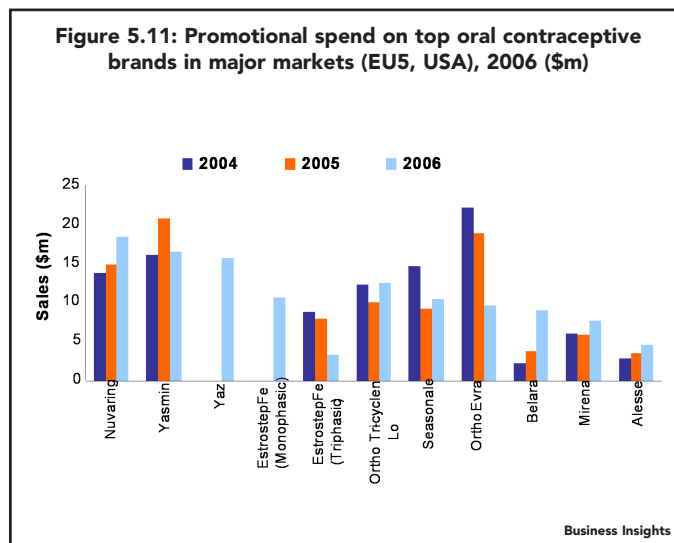
Figure 5.11 displays the top 10 products by promotional spend value on the market in 2006. Six of these products are monophasic preparations with a low dosage of estrogen. For all of the products, spend was predominantly on detailing, with novel brands (Seasonal, Yasmin, Yaz, Ortho Evra and Mirena) also choosing to advertise in medical journals (particularly on launch).

Company analysis

In May 2005 Akzo Nobel NV said its Organon unit has been granted worldwide development and marketing rights by Merck KGaA affiliate Laboratoire Theramex for its new oral contraceptive EMM 310066 (E2/NOMAC). Under the terms of the agreement, Theramex will receive an up-front payment of €10 m on signing as well as further potential milestone payments and royalties dependant on future product sales. Theramex has also retained rights for marketing and distribution of the product in certain countries. Organon has since gone on to complete phase III trials for the product and filed for approval.

In February 2006, Cellergy announced that the company had entered into a worldwide, non-exclusive licensing agreement with CONRAD, a contraceptive research and licensing organization in Arlington, Virginia, for collaboration on the development of Cellegy's entire microbicide pipeline. The agreement encompasses the licensing of Savvy (1.0% C31G vaginal gel) currently in Phase III clinical trials in the United States and Africa; UC-781, currently in expanded Phase I trials in the United States and Thailand; and Cyanovirin-N, in pre-clinical development.

September 2006 saw Barr Pharma Inc announce that Warner Chilcott Ltd has unilaterally waived the exclusivity provision of the license for Barr's generic version of Warner Chilcott's OVCON 35 Tablets oral contraceptive. The waiver makes the license non-exclusive and, as a result, Barr Laboratories Inc., a subsidiary of Barr Pharmaceuticals, Inc., announced intent to launch its generic version of OVCON 35 oral contraceptive in October 2006 under the trade name Balziva. Also at this time Barr Pharma Inc announced that its subsidiary, Barr Laboratories Inc, is launching a generic version of the company's proprietary Seasonale extended-cycle oral contraceptive under the trade name Jolessa.



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