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Market Analysis With Context And Perspective

***Same Day Custom Research Package:
Sample Report (2009-2010)***

A Custom Research Report

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Chapter I

Preliminary Assessments

The staff at Feedback Research Services (FRS) was contacted by the client to conduct a custom market research project. The objective was to estimate and forecast manufacturer revenues for U.S. sales of psoriasis medications:

- Gather and review published market data
- Compare / analyze the numbers
- Estimate and generate a new analysis based on the findings
- Present the analysis in a 3 - 5 page report.

Research Methodology

For this project, research was limited to online materials. A thorough "literature" review was conducted to obtain published market estimates and to identify leading competitors. Estimates and forecasts were gathered from several sources and compared with estimated annual psoriasis drug sales generated by the leading manufacturers. The findings were analyzed and used to create the projections shown later in this report.

Treatment Overviews

Statistics gathered in the early 2000's suggest that psoriasis affected up to 4.0 Americans, and an estimated 150,000 new cases were treated each year. . Although the cause is still unknown, experts believe psoriasis may be associated with a genetic defect. The disease is characterized by an overproduction of skin cells that leads to thickening of the skin and scaling. Red areas most often occur on the scalp, elbows, knees, and back.

Treatment can help 90% of psoriasis patients to be lesion-free or significantly cleared, but a drug that is effective for one individual may not work well for another. Combination therapies can lessen outbreaks, but effective therapy typically requires repeated dermatologist visits. Patient access to qualified specialists may be limited by geographical proximity.

Current statistics from the National Institutes of Health estimate that as many as 7.5 million Americans have psoriasis. Interleukin and TNF-alpha inhibitors have driven strong global sales growth of psoriasis drugs in recent years.

Sample Only

Chapter II

Market Analysis

A wide range of patient numbers and psoriasis drug revenue estimates are available from several online sources. Billion dollar market figures most likely include the full complement of psoriasis treatments, from consumer creams and lotions to expensive autoimmune and/or genetically engineered medications.

Analytical Techniques & Explanations

Market analysis is subjective and "accurate assessments" typically depend upon access to good information from reliable sources (e.g., product revenues cited by leading manufacturers). A useful market analysis specifies what the estimates represent: The types of products included (e.g., prescription psoriasis drugs), the region (e.g., United States), the sales channel (e.g., manufacturers), the methodology (e.g., "bottom-up analysis based on annual revenues reported for the top three drugs, by sales volume"), etc. In the absence of such information, one or more sources can be compared and contrasted to generate a new analysis, using logical assumptions about what the numbers represent.

The U.S. Market, 2007 - 2012

Market reports published by Decision Resources in the past two years provide a fairly consistent analysis for a large portion of the global psoriasis drug market. The older report estimated that revenues of \$2.3 billion were generated in 2007 by psoriasis drug sales in the France, Germany, Italy, Japan, Spain, the United Kingdom, and the United States. If the U.S. market share was 35% (a "ballpark" figure used often by market analysts), 2007 revenues would be \$805.0

million. The report forecasts that new biologic drugs manufactured by Abbott and Johnson & Johnson will account for 20+% of the market in 2017.¹

The most recent Decision Resources report indicated 2008 revenues reached \$3.0 billion, an estimated 30.0% increase over the 2007 figure.² Once again, assigning a 35.0% U.S. market share suggests that 2008 U.S. psoriasis drug revenues grew to \$1.05 billion. The following table uses both report findings to estimate historical, current, and projected revenues in the U.S. psoriasis drug market.

Table 1
U.S. Prescription Psoriasis Drug Market, 2007 - 2012
(Manufacturer Level)

Year	Revenues	Growth Rate
2007	\$ 805,000,000	--
2008	\$1,050,000,000	30.4%
2009	\$1,500,000,000	42.9%
2010	\$2,100,000,000	40.0%
2011	\$2,700,000,000	28.6%
2012	\$3,200,000,000	18.5%

Compound Annual Revenue Growth Rate, 2007 - 2010 = 37.7%

Compound Annual Revenue Growth Rate, 2010 - 2012 = 15.6%

Compound Annual Revenue Growth Rate, 2009 - 2012 = 20.0%

Source: Feedback Research Services

¹ "Biologic Drugs...Will Drive the Psoriasis Drug Market to \$5.0 Billion by 2017," Red Orbit, December 2, 2008 (www.redorbit.com).

² "Abbott/Eisai's Humira Will Achieve Blockbuster Sales....," PharmaLicensing.com, October 26, 2009 (<http://pharmalicensing.com>).

Appendix

References & Resources

Agencies, Companies, Organizations, etc.:

National Institutes of Health (NIH)
<http://www.nlm.nih.gov/medlineplus/psoriasis.html>

National Psoriasis Foundation
http://www.psoriasis.org/netcommunity/learn_statistics

Psoriasis Aid
http://www.psoriasis-aid.com/psoriasis/statistics_of_psoriasis.html

Articles / Web Sites:

"Abbott/Eisai's Humira Will Achieve Blockbuster Sales...," PharmaLicensing.com, October 26, 2009 (<http://pharmalicensing.com>).

"Biologic Drugs... Will Drive the Psoriasis Drug Market to \$5.0 Billion by 2017," Red Orbit, December 2, 2008 (www.redorbit.com).