

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

原薬トップ60 / 動物薬トップブランド100

動物用医薬品の分野で、トップ60位までの原薬（医薬品有効成分:API）の製品および複合剤、トップ50位までの世界的ブランドの複合剤、トップ100位までの世界的ブランドおよびその独占期間の満了時期を調査したユニークな分析報告書です。

March 2013

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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

「原薬トップ60 / 動物薬トップ100」は、動物薬の研究、開発、製造、サプライチェーン、マーケティング、流通に関与する組織、動物薬企業にアドバイスするコンサルティング企業、動物薬市場への参入を検討している企業など、全てに対する“必携”のレポートです。

- 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

本書は、世界の動物薬市場の3分の2を占める「医薬品有効成分のトップ60の製品および複合剤」を特定し、定量化し、分析した最初で唯一のレポートです。
- 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

本書は、世界の動物薬市場の2分の1を占める「トップ50の動物薬ブランドの複合剤・トップ100の動物薬ブランド」を特定し、定量化した最初で唯一のレポートです。
- This is the first and only report that analyses the **Exclusivity** status of the **Top 100 Global Brands**

本書は、トップ100の動物薬ブランドの独占期間の状態について解析した、最初で唯一のレポートです。
- This is the first and only report that analyses the **Generic Resilience** of the **Top 100 Global Brands** post loss of exclusivity

本書は、トップ100の動物薬ブランドが独占期間の満了後、ジェネリックの出現と先発品の防御について解析した、最初で唯一のレポートです。
- This report analyses the **Top 10 Animal Health companies'** brands within the Top 100 Global Brands by Product Group and Age Profile

本書は、トップ100の動物薬ブランドを製品群および年代により分けた、トップ10の動物薬企業のブランドを解析しています。

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

動物用医薬品の分野で、トップ60位までの原薬（医薬品有効成分:API）の製品および複合剤、トップ50位までの世界的ブランドの複合剤、トップ100位までの世界的ブランドおよびその独占期間の満了時期を調査したユニークな分析報告書です。

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March 2013

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Scope 範 囲

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

- 本調査の範囲は、2011年の動物薬市場における、主要な原薬と世界的ブランドを特定し、定量化し、分析することである。
- 本調査は、世界の動物薬市場の3分の2を占める原薬を網羅している。
- 本調査は、世界の動物薬市場の2分の1を占める世界的ブランドを網羅している。
- 本調査は、トップ100位の世界的ブランドの98%を占める企業を、金額でベンチマーク（標準化）している。

Methodology

調査方法

Vetnosis社は、1986年以来、世界の動物薬市場を分析してきました。その経験豊かなアナリストのチームは、この分野に特化し、動物薬企業トップ40社およびトップ25カ国をカバーしています。また、Vetnosis社は、11カ国の主要国で約40,000種類の動物用医薬品を検索できる、独自のオンラインデータベースを提供しています。

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

私たちは、Animal Health Service: Premiumで提供される企業情報から、世界的ブランド製品の複合剤の状況を調査し、調査範囲を広げて、ジェネリック企業とそのポートフォリオをさらに解析しました。

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

独占販売権の消失に関する情報は、特許データベース、規制当局および企業広報を詳細に分析することにより抽出しました。

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

ジェネリック製品が利用可能かどうかは、私たち独自の獣医療ポートフォリオ解析ツール (vPAT-Online) を情報源としています。

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)

製品の承認年は、私たちの企業プロフィール・アーカイブ、規制当局、製薬企業および獣医療ポートフォリオ解析ツール (vPAT-Online) を情報源としています。

Glossary

用語の定義

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/aracnids; 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 原薬ごとのトップ60位の動物用医薬品



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

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