

BIOPHARMACEUTICALS – A GLOBAL MARKET OVERVIEW

Summary

The pharmaceutical R&D pipeline and industry have been witnessing greater degree of dependence on [biopharmaceuticals](#). Development of these products is being undertaken by a growing number of players in the pharmaceutical industry, which include the big pharma companies as also generic drug manufacturers, who are also engaged in developing biosimilars. In conjunction with the traditional small biopharmaceutical companies, the new bigger entrants have been focused on continually expanding the global biologics pipeline, implying that the number and proportion of new pharmaceuticals being commercialized would increasingly comprise biopharmaceuticals and not small molecule drugs. As the cost of developing biopharmaceuticals and bringing them to market is generally much higher, offering enhanced profit margins, it comes as no surprise that the global pharmaceutical industry would continue to rely on biopharmaceuticals for profits and innovation, in addition to its very survival.

Even though the worldwide economic recession has been slow in recovering, the global pharmaceutical and [biopharmaceutical industries](#) have marched ahead, showing profitability and growth. According to estimates, more than 10k therapeutics are currently in the research and development stage, which include chemical substance pharmaceuticals or drugs and biotechnology-derived pharmaceuticals or biopharmaceuticals undergoing over 40k clinical trials. This translates into a significant increase from as little as half-a-decade back, indicating a conspicuous shift in the pharmaceutical industry from developing small molecule drugs to biopharmaceuticals for obtaining novel, ground-breaking and profitable solutions.

The report reviews, analyses and projects the [biopharmaceuticals market](#) (2010-2020) for global and the regional markets including North America, Europe, Asia-Pacific, South America and Rest of World. The regional markets further analyzed for 14 independent countries across North America – The United States, Canada and Mexico; Europe – Germany, the United Kingdom, France, Italy, Spain and Russia; Asia-Pacific – Japan, China and India; South America – Argentina and Brazil.

[Biopharmaceuticals product](#) segments analyzed in this study comprises Monoclonal Antibodies (moAb), Erythropoietin, Biotech Vaccines, Recombinant Human (RH) Insulin, Granulocyte Colony-Stimulating Factor (G-CSF), Interferons, Human Growth Hormones (HGH) and others. Therapeutic areas analyzed include Neurology, Infectious Diseases, Diabetes, Oncology, Cardiovascular and others. Biopharmaceuticals market, estimated at US\$199.7 billion globally in 2013, is further projected to reach US\$497.9 billion by 2020, growing at 13.5% CAGR between 2010 and 2020. Among different product segments, monoclonal antibodies (moAb) constitutes the largest product segment in the [global biopharmaceuticals](#) market accounting for an estimated share of 25.6% in 2013, equating to US\$51.1 billion. In terms of therapeutic area, neurology applications is the largest market for global biopharmaceuticals with an estimated 2013 share of 28.2% valued at US\$56.3 billion, and further expected reach a projected US\$144.5 billion by 2020.

The study includes 249 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. The statistical tables represent the data for the [global market](#) by geographic region, product segment and therapeutic area. This study profiles 25 key global players and 70 major players across North America – 24; Europe – 17; Asia-Pacific – 27 and Rest of World – 2. The report also provides the listing of the companies engaged in research and development, manufacturing and supply of biopharmaceuticals. The global list of companies covers addresses, contact numbers and the website addresses of 492 companies.

For more information: [Biopharmaceuticals – A Global Market Overview](#)

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- Glenmark Pharmaceuticals SA Discovers and Initiates IND Studies for GBR 830
- Navidea Establishes Strategic Alliance with Maimonides Medical Center
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- Novartis Kickoffs Biopharmaceutical Unit Construction
- Roche Partners Chiasma on Octreolin Development and Commercialization
- Partnership between Refine Technology and Gallus BioPharmaceuticals for Continuous Cell Culture Processing
- Navidea Biopharmaceuticals Completes NAV4694's Clinical Trial
- GVK Biosciences Inks Collaboration with Onconova therapeutics on Novel Cancer Drugs
- Completion of Abbott's Research-based Pharmaceuticals Business Spin-off Forms AbbVie
- Bio-Rad Launches 2-DE/WB workflow for Anti-HCP Antibodies Assessment
- Novozymes biopharma Unveils New Brand for its rAlbumin Product Line
- Expansion of Cytovance Biologics' mammalian production capabilities in 2013
- GlaxoSmithKline Partners with Biological E. for Combination Vaccine Development
- Baxter Takes Over Inspiration's OBI-1 Assets
- BASF Acquires Pronova BioPharma
- Sutro Biopharma and Sanofi Pasteur form Alliance on Vaccine Production
- Development of Pertussis mAb therapies Started by Synthetic Biologics and Intrexon Corporation
- Teva Pharmaceuticals Establishes Strategic Alliance with Galena Biopharma on NeuVax
- FDA Approves MycoTOOL PCR Mycoplasma Detection Kit of Roche
- Boehringer Inks Manufacturing Supply Agreement with Apexigen for Cancer mAbs
- Merck Signs Agreement with GE Healthcare to Use [18F] Flutemetamol for the Development of MK-8931, BACE Inhibitor for AD

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Galena Biopharma Collaborates with Leica Biosystems for HER2 Companion Diagnostic Development
ProMetic Life Sciences in Collaboration with NantPharma Develop Second Plasma-derived Biopharmaceutical
Pamorelin LA of Debiopharm Unveiled by Dr. Reddy's in India to Treat Prostate Cancer
Inspiration's OBI-1 for Acquired Hemophilia A Receives FDA's Fast Track Designation
New Licensed Biopharmaceuticals Produced by Fujifilm Diosynth Biotechnologies
PAREXEL Establishes a Strategic Alliance with National Taiwan University Hospital
SAFC Broadens the line of PharmaGrade Raw Materials for Biopharmaceutical Production
ActoGeniX and Merck Form Research Pact
Sandoz Biopharmaceuticals Inaugurates Cellular and Molecular Biology Laboratory in Menges
Boehringer Ingelheim Introduces Smart-to-Launch Fast Track Project Transfer Process
Launch of Biopharmaceutical Contract Manufacturing Offering by Olympus Biotech
SAFC Establishes Strategic Alliance with CrystalGenomics
Global Phase 3 Study for Recombinant Human Insulin of Biocon Achieves Positive Outcome
Fujifilm Diosynth Partners with Piramal Healthcare in ADCs Contract Manufacturing
DSM Collaborates with Paranta Biosciences
Wacker Biotech Partners with XL-protein for PASylated Therapeutic Proteins Production
Implementation of Boehringer Ingelheim's Flexible Biopharmaceutical Disposable Set-up
KUBio, Modular Biopharmaceutical Factory Inaugurated by GE Healthcare
Synthetic Biologics Kickoffs the Development of mAbs to Treat Acinetobacter Infections
Gallus BioPharmaceuticals Establishes Strategic Alliance with Roslin Cells for Cell Therapeutics' Supply
Constellation Pharmaceuticals Forms Strategic Alliance with The Leukemia & Lymphoma Society on BET Inhibitor Development
Evotec AG Inks Collaboration with Aspireo
Boehringer Ingelheim Inks Collaboration with Servier and XOMA
Biochrom AG Acquired by Merck KGaA
Gallus BioPharmaceuticals Partners with Natrix Separations Inc.
Collaboration between Theorem Clinical Research and Gallus BioPharmaceuticals
GE Healthcare Establishes Strategic Alliance with iBio for Using Plant-based Technologies in Biopharmaceuticals Production
Daiichi Sankyo Plans to Initiate Japanese Ministry's Biopharmaceuticals Unit Construction
Inspiration Biopharmaceuticals Places its Two IB1001 Clinical Trials on Hold
ProMetic Life Sciences Inks Collaboration with NantPharma for Plasma-derived Biopharmaceutical Development
Unveiling Bristol-Myers Squibb's Coverage with US\$35 Trefis Price Estimate
Saint-Gobain Introduces C-Flex ULTRA Pump Tubing Excelling the Competition
Launch of Boehringer Ingelheim's Typical Brand Boehringer Ingelheim BioXcellence
Merck KGaA Establishes Alliance with Dr Reddy's to Develop Biosimilar mAbs
Strategic Alliance of DSM to Offer Contract Manufacturing Services

Bharat Biotech and University of Maryland to Collaborate on iNTS Vaccine Development
Collaboration between Daiichi Sankyo and Coherus BioSciences on Biosimilars
Grace and Formac Pharmaceuticals Completes Silica-Based Drug Delivery Technology's Clinical Trial
Celltrion Steps into CMO Business for Novel Drugs Production in Korea
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Sigma-Aldrich Acquires BioReliance to Advance Biopharmaceuticals Production
Sigma-Aldrich Plans BioReliance Acquisition to Offer Biopharmaceutical Testing and Services
Bristol-Myers Squibb Marks Merger Agreement with Inhibitex
Initiation of Hospira's Biosimilar EPO Phase III Clinical Trial in US
Strategic Alliance between GE Healthcare and M+W Group
Lonza Unveils pDNA Production Platform to Produce Microbial Biopharmaceuticals
Repligen Acquires Novozymes Biopharma Sweden AB
Sincere Inks Collaboration with Bristol-Myers Squibb for Developing BMS-795311
Novozymes Biopharma Partners with R-Tech Ueno to Supply AlbuCult
Inspiration Biopharmaceuticals starts the Second OBI-1's Accur8 Clinical Trial
ASLAN Pharmaceuticals and Bristol-Myers Squibb form BMS-777607 Development Pact
Fujifilm Diosynth Biotechnologies Partners with ContraFact Corporation to Develop and Manufacture CF-301
Bayer HealthCare Restructure Collaboration with Onyx Pharmaceuticals
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Biocon Heralds Project Initiation to Establish Biopharmaceutical Manufacturing and R&D Unit in Bio-XCell
CMC Biologics and Inspiration Biopharmaceuticals Collaborate on IB1001 Manufacture
Expansion of Boehringer Ingelheim's Fill and Finish Competences for Biopharmaceuticals
Introduction of BD Recharge by BD Biosciences to Augment Biopharmaceutical Protein Production
Fujifilm Partners with Mitsubishi in Biopharmaceutical Contract Manufacturing
Expansion of Fujifilm Diosynth Biotechnologies' Mammalian Cell Culture Capacity
Xcellerex Inks Collaboration with Gallus BioPharmaceuticals
Strategic License Agreement between Sanofi and Glenmark Pharmaceuticals on GBR500

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Inauguration of EMD Millipore's Biopharmaceutical Technical Center in Shanghai
 Novozymes Biopharma Launches Albufuse Flex Technology Developed by Joining Forces with the University of Oslo
 Amgen's Biopharmaceutical Development and Manufacturing Unit Acquired by Boehringer Ingelheim
 Unveiling of All-in-one Chromatography System of Bio-Rad
 Forest Laboratories and Allergy Asthma Research Institute Fall in SAFE-BioPharma Association
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 Abbott Laboratories, Inc.
 Alder Biopharmaceuticals Inc.

Alexion Pharmaceuticals, Inc
 Amgen, Inc.
 Analytical Biological Services Inc
 Array Biopharma Inc.
 Atlanta Biologicals, Inc
 Baxter Bioscience Inc
 Biogen Idec
 Bristol-Myers Squibb Company
 Charles River Laboratories International, Inc.
 Eli Lilly and Company
 Fujifilm Diosynth Biotechnologies
 Genentech, Inc.
 Genzyme Corporation
 Hospira, Inc.
 Johnson & Johnson
 Millennium Pharmaceuticals, Inc.
 Novozymes Biopharma US, Inc.
 Onyx Pharmaceuticals, Inc.
 Pfizer Inc
 Seattle Genetics, Inc
 Soligenix, Inc.
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 Applikon Biotechnology B.V. (The Netherlands)
 Astrazeneca Plc (United Kingdom)

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BASF SE (Germany)
Bayer AG (Germany)
Boehringer Ingelheim GmbH (Germany)
Cellgenix GmbH (Germany)
Evotec AG (Germany)
Glaxosmithkline, PLC (United Kingdom)
Merck Serono S.A. (Switzerland)
Novartis AG (Switzerland)
Novo Nordisk A/S (Denmark)
Novozymes A/S (Denmark)
Pronova Biopharma ASA (Norway)
Roche Holding AG (Switzerland)
Sanofi (France)
UCB S.A. (Belgium)

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Beijing SI Pharmaceutical Co Ltd (China)

Beijing Tiantan Biological Products Co Ltd (China)

Biocon Ltd. (India)

Biological E Limited (India)

Bukwang Pharmaceutical Co Ltd (South Korea)

Cadila Healthcare Limited (Zydus Cadila) (India)

Celltrion, Inc. (South Korea)

Cipla Ltd (India)

Daiichi Sankyo Company Limited (Japan)

Dainippon Sumitomo Pharma Co Ltd (Japan)

Glenmark Pharmaceuticals Limited (India)

GVK Biosciences Pvt Ltd (India)

Hualan Biological Engineering Inc (China)

LG Life Sciences (South Korea)

Ranbaxy Laboratories Ltd. (India)

RPG Life Sciences Limited (India)

Reliance Life Sciences Pvt Ltd (India)

Samsung Biologics Co Ltd (South Korea)

Sanofi India Limited (India)

SciGen Ltd. (Singapore)

Shanghai Institute of Biological Products (China)

Shantha Biotechnics Ltd (India)

Sun Pharmaceutical Industries Ltd (India)

Suven Life Sciences Ltd (India)

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MAJOR GLOBAL MARKET PLAYERS:

Abbott Laboratories, Inc.
Amgen, Inc.
Astrazeneca PLC
BASF SE
Bayer AG
Biocon Ltd.
Biogen Idec
Boehringer Ingelheim GmbH
Bristol-Myers Squibb Company
Daiichi Sankyo Company Limited
Eli Lilly and Company
Genentech, Inc.
Glaxosmithkline, PLC
Hospira, Inc.
Johnson & Johnson, Inc.
LG Life Sciences
Novartis AG
Novo Nordisk A/S
Pfizer, Inc.
Ranbaxy Laboratories Ltd.
Roche Holding AG
Sanofi
Takeda Pharmaceutical Company Limited
Teva Pharmaceutical Industries Ltd.
UCB S.A

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