

Alzheimer's Drugs Market, 2012-2017

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Abstracts

Introduction

Alzheimer's disease is a neurodegenerative disease of the brain which leads to loss of memory and cognitive functions. With ageing world population, the number of patients suffering from Alzheimer's disease is expected to increase in the future. There is a huge unmet need in the market owing to lack of effective, disease-modifying drugs.

Alzheimer's treatment is a high risk, high reward market. Drugs currently available in the market have reached maturity; patents of leading drugs have either expired or are close to expiry. The current unmet needs represent a huge opportunity for pharmaceutical companies which are developing targeted novel therapies. If successful, they will be in a position to command premium prices and tap the existing opportunity.

The pipeline for Alzheimer's drugs is rich, with drug developers looking for drugs with disease-modifying ability rather than just symptomatic treatments. However, the recent failure of several Alzheimer's drugs in late stage clinical trials present the challenges of developing disease-modifying drugs for areas with an unknown cause. The uncertainty related to the cause of disease, along with unexpected side effects of drugs due to differential responses by individual brains, pose major challenges for drug developers.

Amongst other things, this report provides a detailed overview of the most promising pipeline drugs for the treatment of Alzheimer's. The market is desperate for a therapy that can slow or reverse disease progression. The next five years, from 2012-2017, will see the launch of many new drugs.

Scope of the Report

The Alzheimer's drug market (2011-2017) report extensively examines the various

aspects of the disease's development, commercial and pipeline drugs, associated challenges and initiatives taken by various countries to tackle the disease's spread and raise consumer awareness.

The report focuses on both the regional and global trends centred around drug use and development in the following two key segments:

Acetylcholinesterase inhibitors and

NMDA receptor antagonists

A key objective of the report is to establish the likely evolution of leading drugs, generics and launch of new drugs across the different regions in the world. The report discusses various historical / future trends which have shaped / will shape the US, European and Japanese markets. The research, analysis and insights presented in this report do not include the sales of any diagnostic tests or radiopharmaceuticals available in the market for Alzheimer's diagnosis.

The market forecasts across different segments, regions, brands have been presented till 2017. 2011 is the base year and actual figures have been taken, analysed from publicly available information. Unless otherwise specified, all figures are presented in USD.

While the leading brands, companies and chemicals are considered thoroughly, the report also provides details on the pipeline drugs in various stages of clinical trials.

Key Highlights

The World Alzheimer Report estimates that 35.6 MM people worldwide were living with dementia in 2010. It is estimated that this number will nearly double to 65.7 MM by 2030 and to 115.4 MM by 2050. The occurrence is highest in Asian countries.

The market is categorised under two segments, namely, Acetylcholinesterase inhibitors and NMDA receptor antagonists. Acetylcholinesterase (AChE) Inhibitors dominate the market with net worth equal to USD 4,158 MM in 2011.

The overall market is dominated by four leading brands – Aricept, Namenda,

Exelon and Ebixa. Aricept, whose active ingredient is an AChE inhibitor, accounted for over 40% of the total market in 2011

The US was the largest market for Alzheimer's drugs in 2011 with and accounted for 34.5% of the total market in 2011.

With the expiry of patents of branded drugs, new generics have already entered the market

With all the existing drugs being symptomatic, a number of companies are competing to bring a breakthrough therapy in the market. There are several drugs which are in Phase I, II or III clinical trials.

Opportunities in the market outpace the threats. Increasing prevalence of the disease and an ageing population will add to the disease burden in the coming years.

Research Methodology

Most of the data presented in this report has been gathered by secondary research. We have also conducted interviews with experts in the area (academia, industry, medical practice and other associations) to solicit their opinions on the emerging trends in the market. This is primarily useful for us to draw out our own opinion on how the market will shape up across different regions and drug segments. Where possible, the available data has been checked for accuracy from multiple sources of information.

The secondary sources of information include

Annual reports

Investor presentations

SEC filings

Industry databases

News releases from company websites

Government policy documents

Other analysts' opinion reports

While the focus has been on forecasting the market over the coming five years, the report also provides our independent view on various technological and non-commercial trends emerging in the industry. This opinion is solely based on our knowledge, research and understanding of the relevant market gathered from various secondary and primary sources of information.

The 2011 data are actual sales as reported in the company annual reports and represent full year sales from January to December 2011. The sales have been calculated using quarterly data for some companies for which the financial year ends in March.

Chapter Outlines

Chapter 1 is a high level Executive Summary of the key market insights presented in the report.

Chapter 2 provides a general overview of the disease, its causes, diagnosis and prevalence in different regions. The chapter also highlights the different stages of the diseases and focuses on associated risk factors.

Chapter 3 analyses the global Alzheimer's disease market in 2011 and the likely evolution till 2017. The chapter provides information on the two main segments (Acetylcholinesterase inhibitors and NMDA receptor antagonists), primary drugs, and leading companies.

Chapter 4 focuses specifically on Acetylcholinesterase inhibitors market. The market size and forecasts are provided by sub-segments, drugs and generics and regions. This chapter provides a detailed profile of leading drugs in this particular segment of the market.

Chapter 5 focuses specifically on NDMA receptor antagonists market. The market size and forecasts are provided by sub-segments, drugs and generics and regions. This chapter provides a detailed profile of leading drugs in this particular segment of the market.

Chapter 6 presents detailed information on different regional markets (the US, Europe and Japan). Within each region, the chapter focuses on evolution of leading drugs and various technological, commercial and regulatory trends.

Chapter 7 outlines the various drugs in the pipeline. These drugs have been categorised under Phase I, II and III clinical trials.

Chapter 8 provides profiles of the key companies in this market. Each company profile includes information such as financial performance, geographical presence, marketed / pipeline drugs and recent developments.

Chapter 9 analyses the various factors impacting the global Alzheimer's disease market. The information, structured under the SWOT framework, examines technological, commercial and regulatory trends which have shaped the industry till date. The issues considered impact the various stakeholders (researchers, manufacturers, governments, patients) differently.

Chapter 10 summarises the overall report. In this chapter, we provide a recap of the key takeaways and our independent opinion based on the research and analysis described in previous chapters.

Chapter 11 is an appendix, which provides tabulated data and numbers for all the figures provided in the report.

Chapter 12 is an appendix, which provides a list of companies and organisations mentioned in this report.

Contents

1 EXECUTIVE SUMMARY

- 1.1 Scope of the Report
- 1.2 Research Methodology
- 1.3 Chapter Outlines
- 1.4 Key Highlights
 - 1.4.1. Incidence and Prevalence
 - 1.4.2. Acetylcholinesterase (AChE) Inhibitors Dominate the Market
 - 1.4.3. Aricept was the Top Selling Brand; Namenda is Catching Up Fast
 - 1.4.4. Generics are Rapidly Replacing the Established Brands, Especially in the US
 - 1.4.5. The US was the Largest Market for Alzheimer's Drugs in 2011
 - 1.4.6. Several New Drugs are in the Pipeline
 - 1.4.7. Opportunities in the Market Outpace the Threats

2 INTRODUCTION

- 2.1. Dementia and Alzheimer's
- 2.2. Cause
- 2.3. Incidence and Prevalence
- 2.4. High Burden of Dementia
- 2.5. Poor Diagnosis Rates
- 2.6. Risk Factors
- 2.7. Stages of Alzheimer's Disease
- 2.8. Treatment of Alzheimer's Disease

3 ALZHEIMER'S DRUGS MARKET, 2011-2017

- 3.1. Chapter Overview
- 3.2. State of Alzheimer's Drugs Market in 2011
 - 3.2.1. Acetylcholinesterase (AChE) Inhibitors Continued to Dominate the Market
 - 3.2.1.1. Comparison of AChE Inhibitors and NMDA Receptor Antagonists
 - 3.2.2. Four Leading Drugs Captured 87% of the Market in 2011
 - 3.2.3. With Sales of Aricept, Eisai Captured More Than 33% of the Market
- 3.3. Alzheimer's Treatment Market Forecast, 2011-2017

4 ACETYLCHOLINESTERASE (ACHE) INHIBITORS MARKET, 2011-2017

- 4.1. Overview
- 4.2. AChE Inhibitors Market in 2011
 - 4.2.1. Leading Segments in the AChE Inhibitors Market
 - 4.2.2. Aricept Captured 61.2% of the AChE Inhibitors Market in 2011
- 4.3. Aricept (Eisai/Pfizer), 2011-2017
 - 4.3.1. Aricept Sales in 2011
 - 4.3.1.1. Launch of Generics in the Market
 - 4.3.1.2. Aricept Sales Declined By More Than 90% in the US
 - 4.3.1.3. Strong Growth in Japan Despite the Competition From Aricept Generics and Other Branded Drugs
 - 4.3.2. Life Cycle Management (LCM): Exploring Additional Dosage and Formulations
 - 4.3.2.1. LCM Activities in the US
 - 4.3.2.2. LCM Activities in Japan
 - 4.3.3. Aricept Sales Forecast, 2012-2017
 - 4.3.3.1. Impending Patent Expiries, 2012-2013
 - 4.3.3.2. Marketing Efforts for Aricept
 - 4.3.4. Aricept in Summary
- 4.4. Exelon/ Exelon Patch (Novartis), 2011-2017
 - 4.4.1. Exelon Sales in 2011
 - 4.4.1.1. Exelon Patch Contributed More Than 75% Of The Sales in 2011
 - 4.4.1.2. Europe was the Largest Market for Exelon in 2011
 - 4.4.2. Launch of Generics in the Market
 - 4.4.3. Rivastigmine Patch Launched in Japan
 - 4.4.4. Exelon Sales Forecast, 2012-2017
 - 4.4.5. Exelon in Summary
- 4.5. Razadyne / Reminyl (Janssen / Shire), 2011-2017
 - 4.5.1. Razadyne / Reminyl Sales in 2011
 - 4.5.2. Launch of Generics in the Market
 - 4.5.3. Razadyne / Reminyl in Summary
- 4.6. AChE Inhibitors Market, 2011-2017

5 NMDA RECEPTOR ANTAGONISTS MARKET, 2011-2017

- 5.1. Overview
- 5.2. Mechanism of Action
- 5.3. NMDA Receptor Antagonist Market in 2011
 - 5.3.1. Leading Drugs in the NMDA Receptor Antagonist Market
- 5.4. Namenda (Forest Laboratories), 2011-2017
 - 5.4.1. 'Pay to Delay' Deal for Namenda

- 5.4.2. Expectations from Namenda XR to Save Sales Erosion
- 5.4.3. Namenda Sales Forecast, 2012-2017
- 5.4.4. Namenda in Summary
- 5.5. Ebixa / Abixa (H.Lundbeck)
 - 5.5.1. Ebixa Sales Represented 17% of Lundbeck's Revenue in 2011
 - 5.5.2. Ebixa Sales Forecast, 2011-2017
- 5.6. Axura / Akatinol (Merz)
 - 5.6.1. Axura Sales Forecast, 2012-2017
- 5.7. Memary (Daiichi Sankyo)
 - 5.7.1. Memary Sales Forecast, 2012-2017
- 5.8. NMDA Receptor Antagonist Market, 2012-2017

6 REGIONAL MARKETS FOR ALZHEIMER'S DRUGS 2011

- 6.1. Overview
- 6.2. The US was the Largest Market for Alzheimer's Drugs in 2011
- 6.3. The US Market for Alzheimer's Treatment, 2011-2017
 - 6.3.1. Leading Drugs in the US Alzheimer's Treatment Market, 2011
 - 6.3.1.1. 61.7% of the Market was Captured by Namenda, a Comparatively Newer Drug
 - 6.3.2. Facts About Alzheimer's in the US
 - 6.3.3. Steps to Combat Alzheimer's: Regulatory and National Initiatives
 - 6.3.4. The US Alzheimer's Treatment Market Forecast, 2012-2017
- 6.4. The European Market for Alzheimer's Treatment, 2011-2017
 - 6.4.1. Leading Drugs in the European Alzheimer's Treatment Market, 2011
 - 6.4.2. GERMANY
 - 6.4.2.1. Availability and Reimbursement of Anti-Dementia Drugs
 - 6.4.2.2. National Plan and Initiatives Of Regulatory Authorities
 - 6.4.3. FRANCE
 - 6.4.3.1. Availability and Reimbursement of Anti-Dementia Drugs
 - 6.4.3.2. National Alzheimer's Plan
 - 6.4.4. THE UK
 - 6.4.4.1. Availability and Reimbursement of Anti-Dementia Drugs
 - 6.4.4.2. Burden of Dementia in the UK
 - 6.4.4.3. National Dementia Plan
 - 6.4.5. SPAIN
 - 6.4.5.1. Availability and Reimbursement of Anti-Dementia Drugs
 - 6.4.6. ITALY
 - 6.4.6.1. Availability and Reimbursement of Anti-Dementia Drugs

- 6.4.7. European Alzheimer's Treatment Market Forecast, 2012-2017
- 6.5. The Japanese Market for Alzheimer's Treatment, 2011-2017
 - 6.5.1. Leading Drugs in the Japanese Alzheimer's Treatment Market, 2011
 - 6.5.1.1. Aricept: The Ageing Ruler of the Japanese Alzheimer's Market
 - 6.5.1.2. Memary or Exelon: The Successor to Aricept?
 - 6.5.1.3. Other New Introductions to the Japanese Market
 - 6.5.2. Initiatives to Combat Alzheimer's
 - 6.5.3. Japanese Alzheimer's Treatment Market, 2012-2017
 - 6.5.3.1. Threat to Aricept
 - 6.5.3.2. Downward Repricing of Aricept and Reminyl
- 6.6. Summary of Regional Distribution of Alzheimer's Treatment Market, 2011-2017

7 ALZHEIMER'S DRUGS IN THE PIPELINE 2012

- 7.1. Drugs in Phase I and Phase II
- 7.2. Drugs in Phase III: Hype or Hope?
 - 7.2.1. Monoclonal Antibodies Targeting β -amyloid
 - 7.2.1.1. Bapineuzumab (Janssen / Pfizer & Elan / Wyeth)
 - 7.2.1.2. Solanezumab (Eli Lilly)
 - 7.2.2. Intravenous Immunoglobulin Targeting β -amyloid
 - 7.2.2.1. Gammagard (IGIV) (Baxter Healthcare)
 - 7.2.3. Huperzine A (Shandong Luye Pharmaceutical Company)
 - 7.2.4. Docosahexaenoic Acid (Martek Biosciences)

8 PROFILES OF LEADING COMPANIES

- 8.1. EISAI
 - 8.1.1. Geographical Presence
 - 8.1.2. Financial Performance
 - 8.1.3. Marketed and Pipeline Drugs
 - 8.1.4. Recent Developments
- 8.2. PFIZER
 - 8.2.1. Geographical Presence
 - 8.2.2. Financial Performance
 - 8.2.3. Marketed and Pipeline Drugs
 - 8.2.4. Recent Developments
- 8.3. FOREST LABORATORIES
 - 8.3.1. Geographical Presence
 - 8.3.2. Financial Performance

- 8.3.3. Marketed and Pipeline Drugs
- 8.4. H. LUNDBECK
 - 8.4.1. Geographical Presence
 - 8.4.2. Financial Performance
 - 8.4.3. Marketed and Pipeline Drugs
- 8.5. NOVARTIS
 - 8.5.1. Geographical Presence
 - 8.5.2. Financial Performance
 - 8.5.3. Marketed and Pipeline Drugs

9 SWOT ANALYSIS

- 9.1. Overview
- 9.2. Strengths
 - 9.2.1. Alzheimer's Disease: Silently Growing Child
 - 9.2.2. Ageing Global Population
 - 9.2.3. Unmet Needs in the Market
 - 9.2.4. Alzheimer's Now a National Concern
- 9.3. Weaknesses
 - 9.3.1. The Unsolved Mystery
 - 9.3.2. Lack of Awareness
 - 9.3.3. Poor Diagnosis Rates
 - 9.3.4. Side Effects of Available Drugs
 - 9.3.5. Patent Expiry and Launch of Generics
- 9.4. Opportunities
 - 9.4.1. Growing Pharmaceutical Markets of Emerging Countries
 - 9.4.2. Diagnostic Tests in Development to Allow Early Diagnosis
 - 9.4.3. The Pipeline is Rich
 - 9.4.4. Unresponsiveness to AChE Inhibitors
 - 9.4.5. Prodromal AD
- 9.5. Threats
 - 9.5.1. High Rate of Drug Failure
 - 9.5.2. Pricing Pressures

10 CONCLUSIONS

- 10.1. Alzheimer's: A Chronic Dilemma
- 10.2. Current State of the Treatment Market
- 10.3. Attractiveness of the Pipeline

10.4. Key Driving Factors

10.5. Concluding Remarks

List Of Tables

LIST OF TABLES

- TABLE 2.1 Comparison of Marketed Drugs
- TABLE 4.1 Drug Profile: Aricept
- TABLE 4.1 Drug Profile: Exelon
- TABLE 4.3 Razadyne ER Generics (8 mg, 16 mg, 24 mg Dosage)
- TABLE 4.4 Razadyne Oral Tablet Generics (4 mg, 8 mg, 12 mg Dosage)
- TABLE 4.5 Drug Profile: Razadyne / Reminyl
- TABLE 5.1 Drug Profile: Namenda
- TABLE 7.1 Drugs in Phase I Clinical Trials
- TABLE 7.2 Drugs in Phase II Clinical Trials
- TABLE 9.1 SWOT Analysis of the Alzheimer's Treatment Market
- TABLE 9.2 Global Population 65 and Over - 2010, 2015 and 2020
- TABLE 9.3 Diagnostic Tests in Development for Alzheimer's Disease
- TABLE 11.1 Regional Prevalence of Dementia, 2010 and 2030 (MM)
- TABLE 11.2 Cost of Dementia Care, 2010 (USD BN)
- TABLE 11.3 Alzheimer's Drugs Market, 2011 - Key Segments (USD MM)
- TABLE 11.4 Alzheimer's Drugs Market, 2011 - By Leading Drugs (USD MM)
- TABLE 11.5 Alzheimer's Drugs Market, 2011 - By Leading Companies (USD MM)
- TABLE 11.6 Alzheimer's Drugs Market Forecast - By Leading Segments, 2012-2017 (USD MM)
- TABLE 11.7 AChE Inhibitors Market, 2011 - By Leading Segments (USD MM)
- TABLE 11.8 AChE Inhibitors Market, 2011 - By Leading Drugs (USD MM)
- TABLE 11.9 Aricept: Branded and Generic Sales, 2011 (USD MM)
- TABLE 11.10 Aricept Sales in the US, 2011 - By Formulation (USD MM)
- TABLE 11.11 Aricept Sales Forecast - By Regions, 2012 - 2017 (USD MM)
- TABLE 11.12 Sales of Branded and Generic Drugs in the Rivastigmine Market, 2011 (USD MM)
- TABLE 11.13 Exelon Sales, 2011 - By Mode of Administration (USD MM)
- TABLE 11.14 Exelon Sales Forecast - By Regions, 2012 - 2017 (USD MM)
- TABLE 11.15 Razadyne / Reminyl Sales, 2011 (USD MM)
- TABLE 11.16 AChE Inhibitors Market Forecast - By Leading Drugs, 2012 - 2017 (USD MM)
- TABLE 11.17 NMDA Receptor Antagonist Market, 2011 - By Leading Drugs (USD MM)
- TABLE 11.19 NMDA Receptor Antagonist Market Forecast - By Leading Drugs, 2012 - 2017 (USD MM)
- TABLE 11.20 Alzheimer's Drugs Market, 2011 - By Regions (USD MM)

TABLE 11.21 The US Alzheimer's Treatment Market, 2011 - By Leading Drugs (USD MM)

TABLE 11.22 The US Alzheimer's Treatment Market Forecast, 2012 - 2017 (USD MM)

TABLE 11.23 European Alzheimer's Treatment Market, 2011 - By Leading Drugs (USD MM)

TABLE 11.24 European Alzheimer's Treatment Market Forecast, 2012 - 2017 (USD MM)

TABLE 11.25 Japanese Alzheimer's Treatment Market, 2011 – By Leading Drugs (USD MM)

TABLE 11.26 Japanese Alzheimer's Treatment Market Forecast, 2012 - 2017 (USD MM)

TABLE 11.27 Global Alzheimer's Treatment Market Forecast, 2012 - 2017 (USD MM)

List Of Figures

LIST OF FIGURES

FIGURE 2.1 Regional Prevalence of Dementia, 2010 and 2030 (# MM)

FIGURE 2.2 Cost of Dementia Care (USD BN, %)

FIGURE 3.1 Alzheimer's Drugs Market, 2011 - By Segments (USD MM, %)

FIGURE 3.2 Alzheimer's Drugs Market, 2011 - By Leading Drugs (USD MM, %)

FIGURE 3.3 Alzheimer's Drugs Market, 2011 - By Leading Firms (USD MM, %)

FIGURE 3.4 Sales Forecast of Alzheimer's Treatment Market - By Segments, 2012 - 2017 (USD MM)

FIGURE 4.1 AChE Inhibitors Market, 2011 - By Leading Segments (USD MM, %)

FIGURE 4.2 AChE Inhibitors Market, 2011 - By Leading Drugs (USD MM, %)

FIGURE 4.3 Sales of Branded and Generic Aricept (USD MM, %)

FIGURE 4.4 Aricept Sales, 2011 - By Regions (USD MM, %)

FIGURE 4.5 Sales of High Dose Aricept in the US, 2011 (USD MM, %)

FIGURE 4.6 Aricept Sales Forecast - By Regions, 2012 - 2017 (USD MM)

FIGURE 4.7 Sales of Branded and Generic Drugs in the Rivastigmine Market, 2011 (USD MM)

FIGURE 4.8 Sales of Exelon Patch and Oral Capsules, 2011 (USD MM, %)

FIGURE 4.9 Exelon Sales, 2011 - By Regions (USD MM, %)

FIGURE 4.10 Exelon Sales Forecast - By Regions, 2012 - 2017 (USD MM)

FIGURE 4.11 Galantamine Hydrobromide Market, 2011 - By Drugs (USD MM, %)

FIGURE 4.12 Sales Forecast of AChE Inhibitors Market - By Leading Drugs, 2012 - 2017 (USD MM)

FIGURE 5.1 NDMA Receptor Antagonists Market, 2011 - By Leading Drugs (USD MM, %)

FIGURE 5.2 Namenda Sales Forecast, 2012 - 2017 (USD MM)

FIGURE 5.3 Ebixa Sales Forecast - By Regions, 2012 - 2017 (USD MM)

FIGURE 5.4 Axura Sales Forecast, 2012 - 2017 (USD MM)

FIGURE 5.5 Memary Sales Forecast, 2012 - 2017 (USD MM)

FIGURE 5.6 Sales Forecast of NMDA Receptor Antagonists Market - By Leading Drugs, 2012 - 2017 (USD MM)

FIGURE 6.1 Alzheimer's Drugs Market, 2011 - By Regions (USD MM, %)

FIGURE 6.2 The US Alzheimer's Treatment Market, 2011 - By Leading Drugs (USD MM, %)

FIGURE 6.3 The US Alzheimer's Treatment Market Forecast - By Leading Drugs, 2012 - 2017 (USD MM)

FIGURE 6.4 European Alzheimer's Treatment Market, 2011 - By Leading Drugs (USD

MM, %)

FIGURE 6.5 European Alzheimer's Treatment Market Forecast - By Leading Drugs, 2012 - 2017 (USD MM)

FIGURE 6.6 Japanese Alzheimer's Treatment Market, 2011 - By Leading Drugs (USD MM, %)

FIGURE 6.7 Japanese Alzheimer's Treatment Market Forecast - By Leading Drugs, 2012 - 2017 (USD MM)

FIGURE 6.8 Global Alzheimer's Treatment Market Forecast - By Leading Regions, 2012 - 2017 (USD MM)

FIGURE 9.1 Stakeholders in the Alzheimer's Treatment Market

LIST OF COMPANIES AND ORGANISATIONS

The following companies have been mentioned in this report:

1. Abbott Laboratories
2. Accord Healthcare
3. Actavis Pharma
4. Adamas Pharmaceuticals
5. AFFiRis
6. Allon Therapeutics
7. Apotex
8. Archer Pharmaceuticals
9. AstraZeneca
10. Aurobindo Pharma
11. Avineuro Pharmaceuticals
12. Barr Pharmaceuticals
13. Baxter Healthcare
14. Biogen Idec
15. Biotie Therapies
16. Bristol-Myers Squibb
17. Ceregene
18. Cipla
19. Cytos Biotechnology
20. Daiichi Sankyo
21. DiaGenic
22. Dr. Reddy's Laboratories
23. Eisai Pharmaceuticals
24. Elan Pharmaceuticals

25. Eli Lilly
26. EnVivo Pharmaceuticals
27. Exonhit Therapeutics
28. Forest Laboratories
29. GE Healthcare
30. GlaxoSmithKline
31. Greenstone
32. H.Lundbeck
33. High Point Pharmaceutical
34. Hikma Pharmaceuticals
35. Hoffmann- La Roche
36. Huahai US
37. Humanetics Corporation
38. Impax
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41. Jubilant Life Sciences
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47. Mylan
48. Nanotherapeutics
49. Novartis
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53. Ortho-McNeil Janssen Pharmaceuticals Inc
54. Pfizer
55. Piramal Healthcare
56. Pliva Hrvatska
57. Prana Biotechnology
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59. QR Pharma
60. Ranbaxy
61. Roskamp Institute
62. Roxane
63. Sandoz

64. Sano?-aventis
65. Schering Plough
66. SeneXta Therapeutics
67. Shandong Luye Pharmaceuticals
68. Shire Pharmaceuticals group
69. Sonexa Therapeutics
70. Sun Pharmaceutical Industries
71. Takeda Pharmaceuticals
72. Targacept
73. TauRx Pharmaceuticals
74. Teva Pharmaceuticals
75. Theravance
76. Torrent Pharmaceuticals
77. Toyama Chemical
78. Transition Therapeutics
79. TransTech Pharma
80. United Biomedical
81. VIVUS
82. Watson Laboratories
83. Wockhardt

The following organisations have been mentioned in this report:

1. European Medicines Agency (EMA)
2. Geoffrey Beene Gives Back Alzheimer's Initiative
3. Institute for Quality and Efficiency in Health care (IQWiG)
4. Japan's Central Social Insurance Medical Council
5. Medical Center for Dementia (MCD), Japan
6. National Alzheimer's Project Act (NAPA)
7. National Health Insurance (NIH)
8. National Institute of Health and Clinical Excellence (NICE)
9. Supplementary Protection Certificates
10. US Food and Drug Association (FDA)

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