

The Bristol-Myers Squibb Intelligence Dossier

<https://marketpublishers.com/r/B358043F49FEN.html>

Date: March 2010

Pages: 51

Price: US\$ 295.00 (Single User License)

ID: B358043F49FEN

Abstracts

“Without the strength to endure the crisis, one will not see the opportunity within,” author and business commentator Chin-Ning Chu recently said. “It is within the process of endurance that opportunity reveals itself.”

That the pharmaceutical industry is undergoing a crisis is undeniable—as are the opportunities companies like multinational drugmaker Bristol-Myers Squibb are creating out of it.

Fuelled by the onslaught of generics and biosimiliars, BMS has taken the bold step of splitting off its Mead Johnson Nutrition arm to focus attention on biopharmaceuticals. Although some have criticized the strategy as removing the company’s last source of earning diversification, one thing is clear: the decision netted BMS a fourth quarter income of \$8 billion over \$1.2 billion from a year earlier, which will fund the company’s long-stated goal of small to mid-sized acquisitions, such as the \$2.4 billion purchase of Medarex in September 2009. What’s more, in another fourth quarter deal, BMS took on a global agreement that could result in the \$1 billion exclusive rights to develop and commercialise a novel monoclonal antibody for the treatment of rheumatoid arthritis.

Although the company met its expected 11 per cent growth in the dying months of 2009, garnered positive news sentiment throughout the last seven months, and has in hand a raft of clinical trials and drug approvals ranging from Abiligy and Onglyza to DuoPlavin, not all headlines were good. There were undisclosed job cuts, speculation of potential revenue loss from forthcoming HIV drug competitors and disappointing regulatory results.

And so the question remains: As the winds of change blow, is BMS headed in the right direction?

Key insights on critical developments

FirstWord's The Bristol-Myers Squibb Intelligence Dossier charts BMS' health by examining the news events behind 160 headlines from July 2009 to January 2010, covering everything from the Mead Johnson Nutrition split to the impact of new competitors. In the dossier, FirstWord analyzes not just news sentiment and content, but offers a breakdown of topics covered both in charts and in concise, clear-visioned reporting.

The report reviews events to establish:

BMS' repositioning of interests to pursue biopharmaceuticals and small to medium acquisitions

The greatest areas of news coverage, divided by drug and research, corporate and financial categories

The report

Offers a detailed synopsis of major events, their coverage and corporate responses

Updates all of BMS' major brands, clinical trials, new releases and approvals from Q3 to January 2010

Reviews which news stories garnered positive and negative spins by quarter and topic, including comparative analysis of BMS against news sentiment generated by three other key players

Offers insight into major sales and marketing outcomes

Delivers a general company overview, including stakeholder details, financials and emerging pipeline developments

Critical information included in this report

Quarter by quarter news sentiment analysis, cross referenced and analyzed by subject

Overview of BMS' overall strategy, as it pertains to business focus, financial performance and acquisitions

Point by point breakdown of all news events by category of drugs, research, corporate or financial

Key Quotes

Commenting on the BMS split from Mead Johnson Nutrition, Credit Suisse analysts noted that "although [the biopharmaceuticals] business composition is more in line with Bristol-Myers Squibb's stated long-term strategy, it removes [the company's] last source of earnings diversification."

Former BMS chief financial officer Jean-Marc Huet on the Mead Johnson deal commented that the company's cash and its track record in making deals has strengthened its competitive position among large pharmaceutical companies in going after smaller drug developers. He added: "We actually believe that a lot of opportunities today, we either didn't identify 12 months ago, or weren't there 12 months ago."

Commenting on speculation that Bristol-Myers Squibb is a takeover target, CEO James Cornelius stated: "We've said over and over again, 'We're not for sale.'" The executive noted that "there is \$10 billion of real cash in the bank" with which the company can carry out its plan to make small- to medium-sized acquisitions. "We're out hunting and we'll see what we come up with," he added.

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