

Coagulation Factors 2010 – The Portfolio Aspect as Decisive Force: A Competitive Landscape and R&D Pipeline Analysis of Hemostasis Proteins

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Abstracts

Product description

The report “Coagulation Factors 2010 - The Portfolio Aspect as Decisive Force: A Competitive Landscape and R&D Pipeline Analysis of Hemostasis Proteins” provides a description, evaluation and assessment of the recombinant and plasma-derived coagulation factor pipelines as of September 2010. The authors analyze and assess the target pipeline for each of the coagulation factors used for systemic and topical administration. Companies active in the therapeutic coagulation factor business are evaluated and the strengths, weaknesses, opportunities and threats (SWOT) in their R&D pipeline benchmarked in the respective peer group. Technologies used for creation of next generation coagulation factors are discussed and assessed. The report identifies strategies to overcome weaknesses in the portfolio and suggests development strategies.

Background:

Global sales of the five major recombinant products of coagulation factors VIII, IX and VIIa in 2009 were US\$ 5.5 bln (with \$ conversion rate of September 2, 2010). As of 2009, substance patents have commenced to expire in the first territories and are continuing to expire over the next few years. As a consequence, established companies have intensified their efforts to defend or even expand their coagulation factor sales and new players have been entered this commercially attractive field.

Scope of the report

R&D pipeline overview;

in depth profiles of most promising coagulation factors in the pipeline

pipeline analysis for each coagulation factor ;

evaluation and assessment of protein engineering and drug delivery technologies

overview and analysis of marketed coagulation factors;

profiles of more than 50 companies active in this business;

corporate product portfolios and R&D pipelines;

benchmark and SWOT analysis of corporate competitors within peer group

Highlights

None of the established marketers of recombinant coagulation factors so far has achieved to get a next generation coagulation factor product approved to convert sales from the first generation product to the next generation product.

The five marketed recombinant coagulation factors (VIII, IX and VIIa) are facing a total of more than 41 different projects among the three hemophilia coagulation factors in the R&D pipeline: 12 projects (equally distributed among the three factors) are in clinical stage and another 7 molecules are in IND enabling studies or at pre-IND stage ready to enter phase I during the next 12 months. Further 22 molecules are in preclinical R&D. The field is moving rapidly and the next two years will see important progress in the development of new molecules because the drug discovery phase has provided sufficient candidates for non-clinical and clinical development.

Novo Nordisk extended its leading position in the competitive R&D landscape of next generation coagulation factor products with a highly differentiated portfolio approach.

In addition to differentiating the properties of a single coagulation factor, more than 10 companies are active with more than one of the three different coagulation factors emphasizing the importance of the portfolio aspect in the future marketing efforts. Not

only the established companies with recombinant coagulation factors on the market are developing a differentiated portfolio, but also newcomers to the field are developing more than one factor. Portfolio not only means the addition of a second or even third coagulation factor, but even within the same coagulation factor molecules with different half-life properties or administration feature.

Benefits from the report

Understand your position in a highly competitive environment

Avoid costly mistakes

Learn from your competitors

Challenge your strategy with a view from outside the organization

Revise weaknesses of your molecule and development plan

Identify threats to your business plan

Realize new opportunities suggested by the report

Reassure and build upon your strengths

Find applications for your technology

Target audience

Project, product and portfolio managers

Business development & licensing

Research & development

Technology evaluation

Financial analysts

Investment fund/venture capital managers

Plasma fractionation companies with coagulation factor business

Drug delivery companies

Protein engineering companies

Companies with surgery and wound healing business

Companies interested in biosimilars/biogenics

Companies mentioned in the report

Abraxis Biosciences

Amsterdam Molecular Therapeutics

Amunix

Angiotech

Apitope

Archemix

Arecor

Asklepios Biopharmaceutical

Baxter

Bayer Schering Pharma

Bio Products Laboratory (BPL)

Biogen Idec

Biotest

Catalyst Biosciences

China Biologic Products

CSL

Ethicon (J&J)

Fresenius Kabi

Genavia Therapeutics

Green Cross

Grifols

GTC Biotherapeutics

Hualan Biologic Engineering

Inspiration Biopharmaceuticals

Intas Biopharmaceuticals

Ipsen

Kaketsuken

Kamada

Kedrion

King Pharmaceuticals

LFB

Lipoxen

Mochida Pharmaceutical

National Bioproducts Institute (NBI)

Novo Nordisk

Nycomed

Octapharma

Origen Therapeutics

Orthovita

Pfizer

Pharming

ProFibrix

PROLOR Biotech

Recoly

Sanquin

Shanghai RAAS

SK Chemicals

Swedish Orphan Biovitrum

Talecris Biotherapeutics

Thermogenesis

Thrombotargets

VIRxSYS

Vivostat

Zymogenetics

Contents

1 EXECUTIVE SUMMARY

2 INTRODUCTION:

- 2.1 Overview
- 2.2 Commercial uses of coagulation factors
- 2.3 Epidemiology of coagulation disorders
- 2.4 Market size
- 2.5 Patent expiration
- 2.6 Industrial stakeholders

3 SUMMARY OF PIPELINE CHANGES SINCE AUGUST 2009

4 TARGET PIPELINE ANALYSIS

- 4.1 Factor VIII
- 4.2 Factor IX
- 4.3 Factor VII
- 4.4 von Willebrand Factor (vWF)
- 4.5 Other Coagulation Factors
- 4.6 Topical Coagulation Factors (Hemostats)
- 4.7 Alternative Procoagulants & Adjuncts
- 4.8 Other Experimental Hemophilia Therapies

5 CORPORATE BENCHMARK ANALYSIS

- 5.1 The TOP League
 - 5.1.1 Baxter
 - 5.1.2 Novo Nordisk
 - 5.1.3 Bayer Schering Pharma
 - 5.1.4 Pfizer
 - 5.1.5 A Cross-Comparison
- 5.2 The Diversifying Companies
 - 5.2.1 CSL
 - 5.2.2 Octapharma
 - 5.2.3 LFB
 - 5.2.4 Talecris Biotherapeutics

5.3 The Emerging Companies

5.3.1 Zymogenetics

5.3.2 Biogen Idec

5.3.3 Swedish Orphan Biovitrum

5.3.4 Inspiration Biopharmaceuticals & Ipsen

5.3.5 Green Cross

5.3.6 SK Chemicals

5.3.7 Thrombotargets

5.3.8 GTC Biotherapeutics

5.3.9 Pharming

5.3.10 ProFibrix

5.4 The Facilitator Companies

5.5 The Traditional Companies

5.6 The Unclassified Companies

6 REFERENCES

7 TABLES IN THE TEXT

Table 1 Prevalence of rare coagulation factor disorders

Table 2 2009 Sales of Recombinant Factor VIII Products

Table 3 Growth of the recombinant Factor VIII market (US\$ mln)

Table 4 BeneFix Sales (2000 – 2009)

Table 5 NovoSeven Sales (2000 – 2009)

Table 6 Total Sales of recombinant coagulation factors in 2009

Table 7 2009 Sales of selected pd coag. factors for systemic use

Table 8 2009 Sales of selected pd coagulation factors for topical use

Table 9 2009 Sales of coagulation factor product lines per company

Table 10 Changes of manufacturing/formulation in rec. coag. factors

Table 11 Approval / launches of rec coag. factors in the US and EU

Table 12 The TOP coag. factor companies in terms of 2009 sales

Table 13 Product characteristics of improved rhu F. VIII products

Table 14 Overview of R&D pipeline of rec factor VIII products

Table 15 Target profiles of rec wild-type F. VIII products in R&D

Table 16 Target profiles of rec long-acting F. VIII products in R&D

Table 17 Product characteristics of marketed wt rhu F. IX

Table 18 Overview of R&D pipeline of rec factor IX products

Table 19 Target profiles of rec wild-type F. IX products in R&D

Table 20 Target profiles of rec long-acting F. IX products in R&D

Table 21 Product characteristics of marketed wt rhu F. VII
Table 22 Overview of R&D pipeline of rec factor VIIa products
Table 23 Target profile of rec wild-type F. VIIa product in R&D
Table 24 Target profiles of rec long-acting F. VIIa products in R&D
Table 25 US prices of topical thrombin hemostats
Table 26 Companies with marketed human coagulation factors
Table 27 Companies with topical coagulation factors in R&D
Table 28 2009 Sales of selected topical pd coagulation factors
Table 29 Overview on topical hemostats
Table 30 Topical hemostat product portfolios of Ethicon and Baxter
Table 31 Selling points of rhu thrombin products
Table 32 Stakeholders in the topical hemostat field
Table 33 Overview on Baxter's R&D Pipeline in rec coag. factors
Table 34 SWOT analysis of Baxter
Table 35 Overview on Novo Nordisk's R&D pipeline in coag. factors
Table 36 SWOT analysis of Novo Nordisk
Table 37 Overview on Bayer's R&D pipeline in rec coag. factors
Table 38 SWOT analysis of Bayer Schering Pharma
Table 39 Overview on Pfizer's R&D pipeline in rec coag. factors
Table 40 SWOT analysis of Pfizer's
Table 41 Overview on TOP League's R&D pipeline in r coag. factors
Table 42 The largest plasma fractionation companies by plasma vol.
Table 43 The largest plasma fractionation companies by sales
Table 44 SWOT analysis of CSL
Table 45 SWOT analysis of Octapharma
Table 46 SWOT analysis of LFB
Table 47 SWOT analysis of Talecris Biotherapeutics
Table 48 SWOT analysis of Zymogenetics
Table 49 SWOT analysis of Biogen Idec
Table 50 SWOT analysis of Swedish Orphan Biovitrum
Table 51 SWOT analysis of JV Ipsen & Inspiration Biopharma.
Table 52 SWOT analysis of Green Cross
Table 53 Protein engineering companies (ref. rec coagulation factors)
Table 54 Drug delivery companies (ref. rec coagulation factors)
Table 55 Product portfolio of traditional plasma fract. companies

ADDENDUM

A) Executive Drug Profiles

BAX 326
BAX 513
BAY 79-4980
BAY 86-6150
CSL654
CSL689
GreenGene
IB1001
LA-N8
NN1731
NN1810
NN1841
NN7008
NN7128
NN7129
NN7999
OBI-1
Octagenate
rFIXFc
rFVIII Fc
rVWF

TFPI Inhibitory Aptamer

B) Company Profiles

Amsterdam Molecular Therapeutics
Angiotech Pharmaceuticals
Apitope
Archemix
Arecor
Asklepios Biopharmaceutical
Baxter
Bayer Schering Pharma
Bio Products Laboratory (BPL)
Biogen Idec
Biotest
Catalyst Biosciences
Celestial Biologicals
China Biologic Products
CSL
Ethicon (J&J)

Fresenius Kabi
Genavia Therapeutics
Green Cross
Grifols
GTC Biotherapeutics
Hualan Biological Engineering
Inspiration Biopharmaceuticals
Intas Biopharmaceuticals
Ipsen
Jerini (Shire)
Kaketsuken
Kamada
Kedrion
King Pharmaceuticals
LFB
Lipoxen
Maxygen
Marina Biotech
Mochida Pharmaceutical
National Bioproducts Institute (NBI)
Nektar Therapeutics
Novo Nordisk
Novozymes
Nycomed
Octapharma
Origen Therapeutics
Pfizer
Pharming
ProFibrix
ProGenetics
PROLOR Biotech
Recoly
Sanquin
Shanghai RAAS
SK Chemicals
Swedish Orphan Biovitrum
Talecris Biotherapeutics
Thrombotargets
VIRxSYS

Zymogenetics

C) Tabulated Overviews on Profiles of Plasma Derived Coagulation Factors

Tab I: Profile of Human Plasma-Derived Coagulation Factor VIII Concentrates

Tab II: Profile of Highly Purified Human Plasma-Derived Coagulation Factor IX Concentrates

Tab III: Profile of Purified Human Plasma-Derived Prothrombin Complex Concentrates

Tab IV: Profile of Other Human Plasma-Derived Coagulation Factor Concentrates

Tab V: Profile of Topical Coagulation Factor Products & Projects

D) Tabulated Target Pipelines of Coagulation Factors

Tab VI: Human Plasma-Derived Coagulation Factor VIII Concentrates

Tab VII: Recombinant Coagulation Factor VIII Products

Tab VIII: Human Plasma-Derived Coagulation Factor IX Products

Tab IX: Recombinant Coagulation Factor IX Products

Tab X: Human Plasma-Derived Factor VII

Tab XI: Recombinant Coagulation Factor VII Products

Tab XII: Human Plasma-Derived Coagulation Factor Concentrates for vWD

Tab XIII: Recombinant Human Von Willebrand Factor Products

Tab XIV: Human Plasma-Derived Fibrinogen (Factor I)

Tab XV: Recombinant Human Fibrinogen Products

Tab XVI: Human Plasma-Derived Factor XI

Tab XVII: Human Plasma-Derived Factor X

Tab XVIII: Recombinant Human Factor X

Tab XIX: Human Plasma-Derived Factor XIII

Tab XX: Recombinant Human Factor XIII

Tab XXI: Other Recombinant Factors

Tab XXII: Other Experimental Hemophilia Therapies

Tab XXIII: Gene Therapy

Tab XXIV: Topical Human Plasma-Derived Fibrinogen and Thrombin Products

Tab XXV: Topical Plasma-Derived Thrombin Products

Tab XXVI: Topical Recombinant Thrombin Products

Tab XXVII: Human Plasma-Derived Prothrombin Complex Concentrates

E) Tabulated Corporate Product Portfolios and R&D Pipelines

Abraxis Biosciences

Amsterdam Molecular Therapeutics

Amunix

Angiotech

Apitope

Archemix

Arecor

Asklepios Biopharmaceutical
Baxter
Bayer Schering Pharma
Bio Products Laboratory (BPL)
Biogen Idec
Biotest
Catalyst Biosciences
China Biologic Products
CSL
Ethicon (J&J)
Fresenius Kabi
Genavia Therapeutics
Green Cross
Grifols
GTC Biotherapeutics
Hualan Biologic Engineering
Inspiration Biopharmaceuticals
Intas Biopharmaceuticals
Ipsen
Kaketsuken
Kamada
Kedrion
King Pharmaceuticals
LFB
Lipoxen
Mochida Pharmaceutical
National Bioproducts Institute (NBI)
Novo Nordisk
Nycomed
Octapharma
Origen Therapeutics
Orthovita
Pfizer
Pharming
ProFibrix
PROLOR Biotech
Recoly
Sanquin
Shanghai RAAS

SK Chemicals
Swedish Orphan Biovitrum
Talecris Biotherapeutics
Thermogenesis
Thrombotargets
VIRxSYS
Vivostat
Zymogenetics

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