


HEALTHCARE

## **The Cardiovascular Market Outlook to 2011**

By Sarah Riley

 [Table of Contents](#)

## **Sarah Riley**

Sarah Riley is an analyst within the healthcare function of Business Insights. She has a PhD in physiology from King's College, London and is an expert in autoimmune diseases and cardiology. She has previously worked on commercial analyses of the generics market, the future of the diabetes market and pharmaceutical licensing strategies.

Copyright © 2006 Business Insights Ltd

This Management Report is published by Business Insights Ltd. All rights reserved. Reproduction or redistribution of this Management Report in any form for any purpose is expressly prohibited without the prior consent of Business Insights Ltd.

The views expressed in this Management Report are those of the publisher, not of Business Insights. Business Insights Ltd accepts no liability for the accuracy or completeness of the information, advice or comment contained in this Management Report nor for any actions taken in reliance thereon.

While information, advice or comment is believed to be correct at the time of publication, no responsibility can be accepted by Business Insights Ltd for its completeness or accuracy.

# Table of Contents

## The Cardiovascular Market Outlook to 2011

<b>Executive Summary</b>	<b>10</b>
Patient potential	10
Global cardiovascular market analysis	11
Analysis of potential future cardiovascular blockbusters	12
Leading players in the cardiovascular market	13
<b>Chapter 1           Patient potential</b>	<b>16</b>
Summary	16
Introduction	17
Cardiovascular risk factors	17
Hypertension	18
Dyslipidemia	21
Diabetes	23
Cardiovascular disease	26
Acute thrombotic events	28
Acute coronary syndromes	28
Venous thromboembolism	29
Stroke	31
Cardiovascular procedures	32
Percutaneous transluminal coronary angioplasty	32
Coronary artery bypass grafting	33
Insertion of implantable cardioverter defibrillator	33
Heart transplantation	33
<b>Chapter 2           Global cardiovascular market analysis</b>	<b>36</b>
Summary	36
Introduction	37

<b>Key events in the global cardiovascular market, 2005-6</b>	<b>37</b>
Pfizer discontinues torcetrapib development	37
Genomics and new therapeutic targets	38
New therapeutic targets	38
Use of biomarkers/pharmacogenomics	38
Stem cells	38
Genomics	39
<b>Market analysis by country</b>	<b>39</b>
<b>Market analysis by therapy area</b>	<b>40</b>
<b>Leading brands in the global cardiovascular market</b>	<b>42</b>
<b>Anti-hypertensives</b>	<b>43</b>
Introduction	43
Analysis of the leading anti-hypertensives	43
Market analysis by drug class	46
ACE inhibitors	47
Calcium channel blockers	49
Angiotensin receptor blockers	50
Beta blockers	51
Diuretics	53
Other hypertension drugs	53
Anti-hypertensives sales forecasts	54
<b>Anti-dyslipidemics</b>	<b>55</b>
Introduction	55
Analysis of the leading anti-dyslipidemics	55
Market analysis by drug class	57
Statins	57
Fibrates	60
Non-statin products	60
Anti-dyslipidemic sales forecasts	61
<b>Anti-thrombotics</b>	<b>62</b>
Introduction	62
Analysis of the leading anti-thrombotics	62
Market analysis by drug class	64
Anti-platelets	64
Heparins	67
Vitamin K antagonists	68
Fibrinolytics	68
Anti-thrombotics sales forecasts	69
<b>Cardiac therapies</b>	<b>70</b>
Introduction	70
Analysis of the leading cardiac therapies	70
Market analysis by drug class	71
Other cardiac therapies	71
Nitrites and nitrates	72
Anti-arrhythmics	72
Cardiac therapies sales forecast	73

## **Chapter 3                      Analysis of potential future cardiovascular blockbusters                      76**

<b>Summary</b>	<b>76</b>
<b>Introduction</b>	<b>77</b>
<b>Anti-hypertensives</b>	<b>77</b>
Rasilez	78
Exforge	79
CHF-1521	80
Zanipress	81
Cleavelox	82
Cardoxal	82
<b>Anti-dyslipidemics</b>	<b>83</b>
KS-01-019	84
Synordia	85
<b>Anti-thrombotics</b>	<b>86</b>
BAY-597939	87
Rendix	88
Idraparinux	88
Apixaban	89
SSR-126517	89
<b>Cardiac therapies</b>	<b>90</b>
Multaq	91
Stedikor	92
RSD1235	92
Laszarin	94

## **Chapter 4                      Leading players in the cardiovascular market                      96**

<b>Summary</b>	<b>96</b>
<b>Introduction</b>	<b>97</b>
<b>Global market shares</b>	<b>97</b>
<b>Pfizer</b>	<b>99</b>
Marketed products	99
R&D pipeline	100
Cardiovascular portfolio sales forecasts	101
Strategic analysis	102
Drivers of growth	102
Resistors of growth	102
M&A and licensing activity	103
<b>Merck &amp; Co.</b>	<b>103</b>
Marketed products	103

R&D pipeline	104
Cardiovascular portfolio sales forecasts	106
Strategic analysis	106
Drivers of growth	107
Resistors of growth	107
M&A and licensing activity	107
<b>Sanofi-Aventis</b>	<b>108</b>
Marketed products	108
R&D pipeline	110
Cardiovascular portfolio sales forecasts	111
Strategic analysis	112
Drivers of growth	112
Resistors of growth	112
M&A and licensing activity	113
<b>Novartis</b>	<b>113</b>
Marketed products	113
R&D pipeline	115
Cardiovascular portfolio sales forecasts	116
Strategic analysis	116
Drivers of growth	116
Resistors of growth	117
M&A and licensing activity	117
<b>Bristol-Myers Squibb</b>	<b>118</b>
Marketed products	118
R&D pipeline	119
Cardiovascular portfolio sales forecasts	120
Strategic analysis	120
Drivers of growth	120
Resistors of growth	121
M&A and licensing activity	121

<b>Chapter 5</b>	<b>Appendix</b>	<b>124</b>
------------------	-----------------	------------

IMS data	124
Index	125

# List of Figures

Figure 1.1:	Interaction of cardiovascular risk factors	18
Figure 2.2:	Competitive dynamics of the cardiovascular market, 2004-5	42
Figure 2.3:	Competitive dynamics of the leading anti-hypertensives, 2004-5	44
Figure 2.4:	Competitive dynamics of the leading anti-dyslipidemics, 2004-5	56
Figure 2.5:	Competitive dynamics of the leading anti-thrombotics, 2004-5	63
Figure 2.6:	Competitive dynamics of the leading cardiac therapies, 2004-5	70
Figure 4.7:	Leading players in the cardiovascular market, 2004-5	98

# List of Tables

Table 1.1:	Prevalence of hypertension in the 7 major markets, 2005	19
Table 1.2:	Forecast prevalence of hypertension in the 7 major markets, 2006-11	20
Table 1.3:	Lipoprotein families	21
Table 1.4:	Prevalence of dyslipidemia in the 7 major markets, 2005	22
Table 1.5:	Forecast prevalence of dyslipidemia in the 7 major markets, 2006-15	23
Table 1.6:	Prevalence of diabetes in the 7 major markets, 2005	24
Table 1.7:	Forecast prevalence of diabetes in the 7 major markets, 2006-11	25
Table 1.8:	Prevalence of cardiovascular disease in the 7 major markets, 2005	27
Table 1.9:	Forecast prevalence of cardiovascular disease in the 7 major markets, 2006-11	28
Table 1.10:	Prevalence of acute coronary syndromes in the 7 major markets, 2005	29
Table 1.11:	Estimated incidence of VTE in the seven major markets, 2005	30
Table 1.12:	Forecast incidence of VTE in the 7 major markets, 2006-11	30
Table 1.13:	Incidence of stroke in the 7 major markets, 2005	31
Table 1.14:	Forecast incidence of stroke in the 7 major markets, 2006-2011	32
Table 1.15:	Prevalence of heart transplants in the US, 2000-5	34
Table 2.16:	Global cardiovascular sales, 2004-5	40
Table 2.17:	Global sales of key cardiovascular therapy areas, 2001-2005	41
Table 2.18:	Global top 10 selling cardiovascular products, 2005	43
Table 2.19:	Sales of the leading anti-hypertensives, 2004-5	45
Table 2.20:	Patent expiries for anti-hypertensive drugs, 2006	45
Table 2.21:	Anti-hypertensive sales by drug class, 2004-5	46
Table 2.22:	Sales of the leading ACE inhibitors, 2004-5	47
Table 2.23:	Sales of the leading CCBs, 2004-5	49
Table 2.24:	Sales of the leading ARBs, 2004-5	50
Table 2.25:	Sales of the leading beta blockers, 2004-5	52
Table 2.26:	Sales of the leading diuretics, 2004-5	53
Table 2.27:	Anti-hypertensives sales forecast, 2004-11	54
Table 2.28:	Sales of the leading anti-dyslipidemics, 2004-05	56
Table 2.29:	Anti-dyslipidemic sales by drug class, 2004-5	57
Table 2.30:	Anti-dyslipidemics sales forecast, 2004-11	62
Table 2.31:	Sales of the leading anti-thrombotics, 2004-5	63

Table 2.32:	Anti-thrombotic sales by drug class, 2004-5	64
Table 2.33:	Sales of the leading anti-platelets, 2004–05	65
Table 2.34:	Sales of the leading heparins, 2004–05	67
Table 2.35:	Anti-thrombotics sales forecast, 2004-11	69
Table 2.36:	Sales of the leading cardiac therapies, 2004–05	71
Table 2.37:	Cardiac therapies sales forecast, 2004-11	73
Table 3.38:	Anti-hypertensives key late stage pipeline, 2006	78
Table 3.39:	Anti-dyslipidemics key late stage pipeline, 2006	84
Table 3.40:	Anti-thrombotic key late stage pipeline, 2006	87
Table 3.41:	Cardiac therapy key late stage pipeline, 2006	90
Table 4.42:	Leading players in the cardiovascular market, 2004-5	98
Table 4.43:	Pfizer’s global cardiovascular portfolio, 2004-5	100
Table 4.44:	Pfizer’s cardiovascular pipeline, 2006	100
Table 4.45:	Forecast sales for Pfizer’s cardiovascular portfolio, 2004–11	101
Table 4.46:	Merck’s global cardiovascular portfolio, 2004-5	104
Table 4.47:	Merck’s cardiovascular pipeline, 2006	104
Table 4.48:	Forecast sales for Merck’s cardiovascular portfolio, 2004–11	106
Table 4.49:	Sanofi-Aventis’ marketed portfolio, 2004-5	110
Table 4.50:	Sanofi-Aventis’ cardiovascular pipeline, 2006	111
Table 4.51:	Forecast sales for Sanofi-Aventis’ cardiovascular portfolio, 2004–11	112
Table 4.52:	Novartis’ cardiovascular portfolio, 2004-5	114
Table 4.53:	Novartis’ cardiovascular pipeline, 2006	115
Table 4.54:	Forecast sales for Novartis’ cardiovascular portfolio, 2004–11	116
Table 4.55:	Bristol-Myers Squibb’s cardiovascular portfolio, 2004-5	118
Table 4.56:	Bristol-Myers Squibb’s cardiovascular pipeline, 2006	119
Table 4.57:	Forecast sales for Bristol-Myers Squibb’s cardiovascular portfolio, 2004–11	120