

US Pharmaceutical Industry Report, 2008-2009



The United States has the largest pharmaceutical industry in the world. In 2007, its pharmaceutical revenue totaled at US\$ 315 billion.

In the past decades, the structure of American pharmaceutical industry has changed dramatically caused by the aging of population, the emerging of bio-pharmaceutical technology and fierce global competition. The key players in the United States including Pfizer, GlaxoSmithKline, Johnson & Johnson, Merck, etc.

Global Pharmaceutical Output Value and Profits by Region, 2007

	USA	Europe	Japan	BRIC	Others	Total
Revenues [USD bn]	315	210	70	40	50	685
SG&A [%]	30%-40%	20%-35%	30%-40%	20%-30%	30%-40%	25%-35%
COGS [%]	20%-30%	20%-30%	25%-35%	40%-50%	30%-40%	25%-35%
Profit pool [USD bn; range]	95-125	75-95	20-30	10-15	10-20	210-280

Source: Research, Roland Berger

American pharmaceutical companies paid great attention to R & D due to the free market competition and patent protection of new medicines in the US. Since the year of 2000, the pharmaceutical R & D expenditure has been maintaining an increase, even in 2008, impacted by the global financial crisis, the pharmaceutical R & D expenditure totaled at US \$65.2 billion, up 3.16% of last year.

There are 2,900 drugs currently in research in US, among which 750 are anticancer drugs, 312 drugs are for heart diseases, 150 are diabetes drugs and 109 are AIDS drugs, the rest 91 drugs are for the Alzheimer and senile dementia diseases.

In 2009, the sales growth of drugs in the United States is expected to around 1% ~ 2%. The growth of biotechnology, special drugs and generic drugs will be higher than the average.

The report focus on the 30 pharmaceutical companies in the United States, including their profiles, revenue and profit, as well as their products, market distribution and development strategies.

2007 Top Companies by U.S. Sales

RANK	Corporation	2007 Total Dollars (U.S. Billions)	2006 Total Dollars (U.S. Billions)	2005 Total Dollars (U.S. Billions)	2004 Total Dollars (U.S. Billions)	2003 Total Dollars (U.S. Billions)
1	PFIZER	23.5	26.8	27.3	31.1	29.3
2	GLAXOSMITHKLINE	20.1	21.8	20.0	18.9	18.5
3	MERCK & CO	17.6	16.7	15.4	15.3	14.0
4	JOHNSON & JOHNSON	16.3	16.1	16.0	16.7	15.4
5	ASTRAZENECA	15.5	14.7	12.7	11.5	10.1
6	AMGEN	14.3	14.5	11.9	9.7	7.7
7	NOVARTIS	13.9	13.9	13.0	11.6	10.5
8	HOFFMAN-LAROCHE	12.3	10.4	8.2	6.2	5.3
9	SANOFI AVENTIS	10.9	11.0	11.1	10.2	9.0
10	LILLY	10.3	9.2	8.7	8.2	7.7
	TOTAL ALL	286.5	276.1	253.9	239.9	219.6

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Source: IMS National Sales Perspectives™

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