Product Profiles: Marketed Antibacterials - Increasing genericization and fragmentation shape a crowded market

Description: In the last two years, several leading antibacterials lost patent protection, including broad-spectrum drugs Levaquin, Zosyn, and Merrem. Generic incursion will significantly erode future sales for these drugs. A number of strong competitors remain that still hold patent protection, but the majority only target Gram-positive pathogens, including methicillin-resistant Staphylococcus aureus (MRSA).

Features and benefits

- Comprehensive analysis of clinical trial data and assessment of clinical and commercial attractiveness for marketed antibacterials
- Discussion of future strategic opportunities to achieve success in an increasingly fragmented antibacterials market

Highlights

- Levaquin, the biggest-selling antibacterial globally garnering sales over $2.5bn in 2010, lost patent protection in 2011, constituting a major blow to the marketing partners Johnson & Johnson, Daiichi Sankyo and Sanofi. Datamonitor expects generic incursion to be very strong.
- Zyvox remains one of most successful drugs on the market to target Gram-positive bacteria, including methicillin-resistant Staphylococcus aureus (MRSA). Recent clinical trial data have strengthened its position as the drug of choice to treat Gram-positive nosocomial pneumonias, which may swing physician prescribing practices towards Zyvox.
- The anti-MRSA market will become increasingly crowded over the coming years, with the expected approval of several strong competitors. Drugs currently on the market in this sector will need to attempt to fill important treatment gaps by acquiring approval for further indications.

Your key questions answered

- Identify key drugs within the antibacterials market, success factors for leading brands, and the potential for new entrant products.
- Assess strengths, weaknesses, opportunities and threats of key marketed antibacterials and how they influence clinical and commercial attractiveness.

Contents:

Executive Summary
  Strategic scoping and focus
  Datamonitor key findings
  Related reports
OVERVIEW
  Catalyst
  Summary
PRODUCT OVERVIEW
  Key marketed products
MARKETED PRODUCT PROFILES
  Levaquin/Cravit/Tavanic (levofloxacin; Johnson & Johnson/Daiichi Sankyo/Sanofi)
    Drug profile
    Development overview
    SWOT analysis
    Product positioning
    Clinical and commercial attractiveness
  Zosyn/Tazocin (piperacillin/tazobactam; Pfizer/Taisho Pharmaceutical)
    Drug profile
    Development overview
    SWOT analysis
    Product positioning
Clinical and commercial attractiveness
Zyvox (linezolid; Pfizer)
Drug profile
Development overview
SWOT analysis
Product positioning
Clinical and commercial attractiveness
Avelox/Octegra (moxifloxacin; Bayer/Merck & Co.)
Drug profile
Development overview
SWOT analysis
Product positioning
Clinical and commercial attractiveness
Cubicin (daptomycin; Cubist Pharmaceuticals/Novartis/Merck & Co.)
Drug profile
Development overview
SWOT analysis
Product positioning
Clinical and commercial attractiveness
Merrem/Meropen (meropenem; AstraZeneca/Dainippon Sumitomo Pharma)
Drug profile
Development overview
SWOT analysis
Product positioning
Clinical and commercial attractiveness
Tygacil (tigecycline; Pfizer)
Drug profile
Development overview
SWOT analysis
Product positioning
Clinical and commercial attractiveness
Vibativ (telavancin; Theravance/Astellas Pharma)
Drug profile
Development overview
SWOT analysis
Product positioning
Clinical and commercial attractiveness
Other marketed antibacterials
Augmentin (amoxicillin/clavulanate acid; GlaxoSmithKline)
Primaxin/Zienam/Tienam (imipenem/cilastatin; Merck & Co.)
Biaxin/Klaricid/Clarith (clarithromycin; Taisho/Abbott)
Zithromax/Zithromac (azithromycin; Pfizer)

BIBLIOGRAPHY
Journal papers
Websites
Datamonitor reports
APPENDIX
PharmaVitae Explorer database
Contributing experts
Conferences attended
Report methodology

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