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PharmaVitae

The online, interactive competitive intelligence
resource for the healthcare industry

 DATAMONITOR

Excerpts from PharmaVitae's 2002 Comprehensive Market Coverage

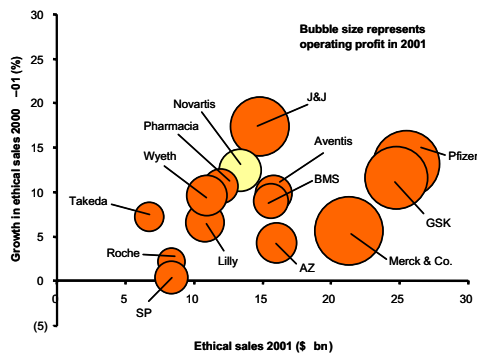
Sample Profile

Excerpt from
Company Profile:
Novartis

Q. What is Novartis' current and future competitive positioning?

A. The figure below highlights Novartis' current position within the pharmaceutical sector. The evolution of Novartis' therapeutic focus over the last two years has seen the company transformed from a troubled player with a high dependency (97 per cent) on aging products into an innovative player with high growth potential. With ethical sales forecast to grow at a CAGR of nine per cent between 2001 and 2007, Novartis has one of the strongest growth prospects of the top pharmaceutical players, potentially overtaking both Johnson & Johnson and AstraZeneca in terms of ethical sales by 2004.

Novartis' Competitive Position, 2001



AZ = AstraZeneca
GSK = GlaxoSmithKline
SP = Schering-Plough
BMS = Bristol-Myers Squibb
J&J = Johnson & Johnson

Source: Datamonitor

Q. What are Novartis' growth drivers to 2007?

A. Datamonitor's analysis suggests that the success of Novartis' cardiovascular franchise and of the ethical business as a whole will be critically dependent on the anti-hypertensive Diovan. With Diovan forecast to generate sales of \$4,393m in 2007 and the support of existing market drugs such as Lescol and Lotrel, Novartis' marketed cardiovascular portfolio is forecast to achieve strong growth. Supporting the cardiovascular franchise will be the cancer portfolio with five drugs likely to be launched in 2005. Unlike the cancer and cardiovascular franchises, Novartis' prospects within the immune disorders and inflammation portfolio are governed by its pipeline and the potential success of COX-189.

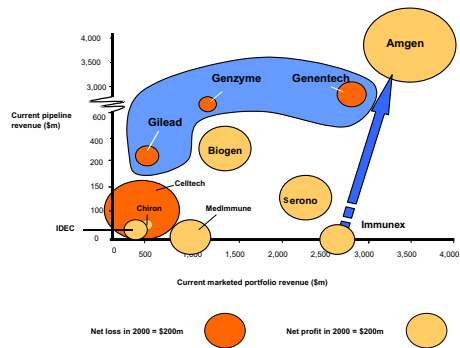
Sample Profile

Excerpt from
Company Profile:
Amgen

Q. In 2006, what Biotechnology company will lead the market, in terms of revenues?

A. Amgen, with the addition of Immunex' inflammation marketed portfolio will be the leader of the biotechnology industry in 2006 with forecast revenues of \$9.4bn. Amgen's current pipeline is forecast to generate revenues of \$3.8bn.

Current Pipeline and Marketed Portfolio Sales of the Industry Leaders, 2006



Source: Datamonitor

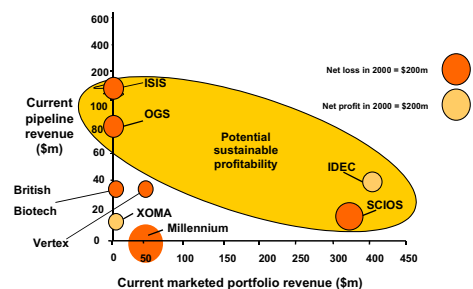
Sample Specialty Report

Excerpt from
Emerging
Biotech Players

Q. What emerging biotech companies will lead the sector in 2006?

A. Datamonitor forecasts that IDEC and SCIOS will lead the emerging biotech sector in 2006 with ethical income reaching \$445m and \$342m, respectively. These will be followed by Isis, the oncology and inflammation expert and OGS, the proteomics leader with forecast revenues of \$161m and \$80m, respectively.

Current Pipeline and Marketed Portfolio Sales of the Emerging Biotech Players in 2006



Source: Datamonitor

TABLE OF CONTENTS

CHAPTER 1 SEPRACOR	8
Key findings	8
Current positioning: revenue breakdown in 2001	9
Strategic outlook	10
Company strategy	11
Introduction to Sepracor	11
Assessment of strategic position	12
Alliance network	17
Portfolio and pipeline analysis	20
Technology focus	20
Single isomer technology	23
Profitability, 1997-2001	42
Liquidity, 1997-2001	44
2001 Performance benchmarking	47
Key events shaping corporate activity 1997–2001	48
CHAPTER 2 APPENDIX	53
Revenues ranking by company, 2001	53
R&D expenditure by company, 2001	54
Financial data	55

Table of Contents

Exchange rates	55
Financial year end	56
Profit and loss account	56
Balance sheet	57
Cash flow statement	58
Key ratios	59
Ratio analysis	60
Datamonitor value rating methodology	61
Datamonitor's Competitive Intelligence Business Unit	63

LIST OF TABLES

Table 1:	Sepracor's portfolio, 2002	20
Table 2:	Single isomer technology portfolio, 2001	24
Table 3:	Summary of Sepracor' historical agreements, 1997–2000	49
Table 4:	Revenues of the nine drug delivery companies, 2000-01	53
Table 5:	R&D expenditure of the nine drug delivery companies, 2000–01	54
Table 6:	Exchange rates	55
Table 7:	Profit and Loss account: Sepracor, 1997–2001	56
Table 8:	Balance sheet: Sepracor, 1997–2001	57
Table 9:	Cash flow: Sepracor, 1997–2001	58
Table 10:	Key financial ratios: Sepracor, 1997–2001	59

LIST OF FIGURES

Figure 1:	Sepracor's financial performance, 2000–01	9
Figure 2:	Assessment of Sepracor's strategic position, 2002	10
Figure 3:	Assessment of Sepracor's portfolio strength	21
Figure 4:	Sepracor's profitability stream, 1997–2001	42
Figure 5:	Sepracor's funding and liquid assets, 1997–2001	45
Figure 6:	Liquidity and profitability ratios, 2001	47