

INTRODUCTION	XX
OBJECTIVES AND GOALS OF THE STUDY	XX
CONTRIBUTION OF THE STUDY AND FOR WHOM	XX
SCOPE AND CONTENT	XX
METHODOLOGY	XXI
INFORMATION SOURCES	XXI
ABOUT THE AUTHOR	XXI
RELATED BCC PUBLICATIONS	XXII
BCC ONLINE SERVICES	XXII
DISCLAIMER	XXIII
EXECUTIVE SUMMARY	XXIV
<i>SUMMARY TABLE GLOBAL MARKETS FOR PRESCRIPTION DRUGS TO TREAT ENDOCRINE AND METABOLIC DISEASES COVERED IN THIS REPORT, THROUGH 2011 (\$ MILLIONS)</i>	XXIV
<i>SUMMARY FIGURE GLOBAL MARKETS FOR PRESCRIPTION DRUGS TO TREAT ENDOCRINE AND METABOLIC DISEASES COVERED IN THIS REPORT, THROUGH 2011 (\$ MILLIONS)</i>	XXV
OVERVIEW	1
THE ENDOCRINE SYSTEM	1
ROLE OF THE HYPOTHALAMUS IN ENDOCRINE FUNCTION	1
<i>TABLE 1 HYPOTHALAMIC NEUROHORMONES</i>	2
TYPES AND ACTIVITIES OF NEUROHORMONES PRODUCED BY THE HYPOTHALAMUS	3
ENDOCRINE DISEASES	3
HYPERTENSION	4
Hypertension (Continued)	5
The Sixth Report of the Joint National Committee on Prevention, Detection, Evaluation, and Treatment of High Blood Pressure	6
<i>TABLE 2 EFFECTS OF ANTIHYPERTENSIVE AGENTS ON SELECTED CORONARY RISK FACTORS</i>	7
The Seventh Report of the Joint National Committee on Prevention, Detection, Evaluation, and Treatment of High Blood Pressure	8
<i>TABLE 3 CLASSIFICATION OF BLOOD PRESSURE FOR ADULTS AGE 18 YEARS AND OLDER</i>	8
INFERTILITY	9
Prevalence of Infertility	10
Causes of Infertility	10
Infertility Factors	10
Female Factors	10

	Tubal Factors.....	11
	Ovulation Factors.....	12
	Amenorrhea	13
	Amenorrhea (Continued)	14
	Amenorrhea (Continued)	15
	Anovulation	16
<i>TABLE 4 CLASSIFICATION OF CHRONIC ANOVULATION</i>		17
	Luteal Phase Dysfunction	18
	Endometriosis	19
	Endometriosis (Continued).....	20
	Fibroids	21
	Other and Unknown Factors.....	21
	Cervical Factors	21
	The Role of Relaxin	22
	Male Factors.....	22
	Varicocele.....	23
	Genetic Factors.....	23
	Microdeletions of the Y-Chromosome	23
	Congenital Bilateral Absence of the Vas	
	Deferens	24
	A-MYB Gene and its Relation to Male	
	Infertility	24
	Reduced Spermatogenesis.....	24
	Hypogonadism.....	25
	Environmental Factors.....	26
	Treatment Protocols.....	27
	THYROID DISORDERS	28
	Functions of the Thyroid Hormones	29
	Clinical Evaluation of Thyroid Disorders	29
<i>TABLE 5 LABORATORY EVALUATION OF THYROID DISORDERS</i>		30
	Hyperthyroidism	30
<i>TABLE 6 CLASSIFICATION OF HYPERTHYROIDISM</i>		31
	Graves' Disease	31
	Hypothyroidism.....	32
	Thyroiditis	32
	METABOLIC DISEASES	33
	HYPERCHOLESTEROLEMIA	34
	Hypercholesterolemia (Continued)	35
	Hypercholesterolemia (Continued)	36
	Relationship of Cholesterol to Cardiovascular Disease	37
	OBESITY	38
	Drug Treatment for Obesity.....	39
	Alternative Treatments for Obesity.....	39
	METABOLIC SYNDROME.....	40

<i>TABLE 7 BODY MASS INDEX RATIOS AND CLASSIFICATION OF OBESITY</i>	40
METABOLIC SYNDROME (CONTINUED).....	41
ENDOCRINE DISEASES — APPLICATIONS AND PRODUCTS.....	42
HYPERTENSION	42
PRESCRIPTION DRUGS FOR THE TREATMENT OF HYPERTENSION	42
Adrenergic Inhibitors	42
<i>TABLE 8 SELECTED ADRENERGIC INHIBITORS: PRECAUTIONS AND SIDE EFFECTS</i>	43
The Market for Adrenergic Inhibitors	44
<i>TABLE 9 GLOBAL MARKET FOR ADRENERGIC INHIBITORS, THROUGH 2011 (\$ MILLIONS)</i>	44
<i>FIGURE 1 GLOBAL MARKET FOR ADRENERGIC INHIBITORS, 2004-2011 (\$ MILLIONS)</i>	44
Angiotensin-Converting Enzyme Inhibitors	45
Angiotensin-Converting Enzyme Inhibitors (Continued)	46
<i>TABLE 10 SELECTED ACE INHIBITORS: PRECAUTIONS AND SIDE EFFECTS</i>	47
The Market for ACE Inhibitors	47
<i>TABLE 11 GLOBAL MARKET FOR ACE INHIBITORS, THROUGH 2011 (\$ MILLIONS)</i>	47
<i>FIGURE 2 GLOBAL MARKET FOR ACE INHIBITORS, 2004-2011 (\$ MILLIONS)</i>	48
Angiotensin II Receptor Antagonists.....	48
The Difference Between ACE Inhibitors and Angiotensin II Inhibitors.....	49
The Market for Angiotensin II Inhibitors	50
<i>TABLE 12 GLOBAL MARKET FOR ANGIOTENSIN II INHIBITORS, THROUGH 2011 (\$ MILLIONS)</i>	50
<i>FIGURE 3 GLOBAL MARKET FOR ANGIOTENSIN II INHIBITORS, 2004-2011 (\$ MILLIONS)</i>	50
Beta Blockers	51
<i>TABLE 13 SELECTED BETA BLOCKERS: PRECAUTIONS AND SIDE EFFECTS</i>	52
Usage Trends of Beta Blockers	53
The Market for Beta Blockers	53
<i>TABLE 14 GLOBAL MARKET FOR BETA BLOCKERS, THROUGH 2011 (\$ MILLIONS)</i>	53
<i>FIGURE 4 GLOBAL MARKET FOR BETA BLOCKERS, 2004-2011 (\$ MILLIONS)</i>	54
Calcium Channel Blockers	54

<i>TABLE 15 SELECTED CALCIUM CHANNEL BLOCKERS: PRECAUTIONS AND SIDE EFFECTS</i>	55
<i>TABLE 15 (CONTINUED)</i>	56
Calcium Channel Blocker Usage.....	56
The Market for Calcium Channel Blockers	57
<i>TABLE 16 GLOBAL MARKET FOR CALCIUM CHANNEL BLOCKERS, THROUGH 2011 (\$ MILLIONS)</i>	58
<i>FIGURE 5 GLOBAL MARKET FOR CALCIUM CHANNEL BLOCKERS, 2004-2011 (\$ MILLIONS)</i>	58
Combination Products	58
The Market for Combination Antihypertensive Products	59
<i>TABLE 17 GLOBAL MARKET FOR COMBINATION ANTIHYPERTENSIVE DRUGS, THROUGH 2011 (\$ MILLIONS)</i>	59
<i>FIGURE 6 GLOBAL MARKET FOR COMBINATION ANTIHYPERTENSIVE DRUGS, 2004-2011 (\$ MILLIONS)</i>	60
Treatment Regimens	60
The Market for Selected Drugs to Treat Hypertension	61
<i>TABLE 18 GLOBAL MARKET FOR SELECTED PRESCRIPTION PRODUCTS TO TREAT HYPERTENSION BY PRODUCT, THROUGH 2011 (\$ MILLIONS)</i>	61
<i>TABLE 19 U.S. MARKET FOR PRESCRIPTION PRODUCTS TO TREAT HYPERTENSION, THROUGH 2011 (\$ MILLIONS)</i>	62
<i>FIGURE 7 U.S. MARKET FOR PRESCRIPTION PRODUCTS TO TREAT HYPERTENSION, 2004-2011 (\$ MILLIONS)</i>	62
Products in Development for the Treatment of Hypertension	62
<i>TABLE 20 SELECTED DRUGS IN PHASE II OR LATER DEVELOPMENT FOR THE TREATMENT OF HYPERTENSION</i>	63
Aliskiren	64
Clevexol	64
Darusentan.....	64
Imidapril.....	65
Nebivolol.....	65
PW2101	65
Tadalafil	66
INFERTILITY	66
ASSISTED REPRODUCTIVE TECHNOLOGIES.....	66
<i>TABLE 21 CURRENTLY AVAILABLE ASSISTED REPRODUCTIVE TECHNOLOGIES</i>	67
<i>TABLE 21 (CONTINUED)</i>	68
<i>TABLE 22 U.S. ASSISTED REPRODUCTIVE TECHNOLOGY PROCEDURE VOLUMES, THROUGH 2011</i>	68
<i>TABLE 22 (CONTINUED)</i>	69

Success Rates for ART.....	69
<i>TABLE 23 U.S. PREGNANCY SUCCESS RATES FOR ART PROCEDURES, 1998</i>	69
<i>TABLE 24 U.S. PREGNANCY SUCCESS RATES FOR ART PROCEDURES, NONDONOR EGGS, 2003</i>	70
<i>TABLE 25 U.S. PREGNANCY SUCCESS RATES FOR ART PROCEDURES, DONOR EGGS, 2003</i>	70
Success Rates for ART (Continued)	71
Success Rates for ART (Continued)	72
Semen Processing.....	73
Intrauterine Insemination	73
<i>In Vitro</i> Fertilization	73
<i>In Vitro</i> Fertilization (Continued).....	74
<i>TABLE 26 EFFECT OF PREVIOUS UNSUCCESSFUL IVF ATTEMPTS ON LIVE BIRTH RATE PER CYCLE</i>	75
<i>TABLE 27 EFFECT OF AGE OF WOMAN ON IVF LIVE BIRTH RATE PER CYCLE</i>	75
<i>TABLE 28 EFFECT OF CAUSE OF IVF INFERTILITY ON LIVE BIRTH RATE PER CYCLE</i>	76
<i>TABLE 29 U.S. IN VITRO FERTILIZATION PROCEDURE VOLUMES, THROUGH 2006</i>	76
Ooplasmic Transfer.....	77
Gamete Intrafallopian Tube Transfer.....	78
Zygote Intrafallopian Transfer.....	78
<i>TABLE 30 U.S. GAMETE INTRAFALLOPIAN TRANSFER AND ZYGOTE INTRAFALLOPIAN TRANSFER PROCEDURE VOLUMES, THROUGH 2006</i>	79
Tubal Embryo Transfer	79
Intracytoplasmic Sperm Injection.....	80
U.S. FERTILITY CLINICS SERVE THE WORLD MARKET	80
THE FUTURE OF BIOTECH IN REPRODUCTIVE TECHNOLOGY.....	81
LEGAL ENVIRONMENT.....	81
THE INFERTILITY TREATMENT MARKET	81
Current Status of the Infertility Market.....	81
Fertility Treatment Market Projections.....	82
<i>TABLE 31 U.S. MARKET FOR INFERTILITY TREATMENT, THROUGH 2011 (\$ MILLIONS)</i>	82
<i>TABLE 32 U.S. COSTS OF INFERTILITY DIAGNOSTICS AND TREATMENTS, 2005 (\$)</i>	83
FERTILITY DRUGS	83
<i>TABLE 33 SELECTED PHARMACEUTICAL AGENTS FOR THE TREATMENT OF FEMALE INFERTILITY</i>	83
<i>TABLE 33 (CONTINUED)</i>	84

Major Participants in the Fertility Drug Market.....	84
<i>TABLE 34 MANUFACTURERS OF FERTILITY DRUGS AND THEIR PRODUCTS.....</i>	<i>84</i>
<i>TABLE 34 (CONTINUED).....</i>	<i>85</i>
Genetically Engineered Products Take Over the Market.....	85
Increasing Focus on the Treatment of Male Infertility.....	86
Leading Fertility Drugs.....	86
<i>TABLE 35 LEADING FERTILITY DRUGS BY INDICATION.....</i>	<i>87</i>
Bromocryptine Mesylate.....	87
Cetrotide.....	87
Chlorotriansene.....	88
Clomiphene Citrate.....	88
Danazol.....	89
Estrogens.....	89
Estradiol Valerate.....	90
Esterified Estrogens.....	90
Estrone.....	90
Estropipate.....	90
Ethinyl Estradiol.....	91
Gonadorelin Acetate.....	91
Gonadotropins.....	91
<i>TABLE 36 GONADOTROPIN USAGE IN SELECTED COUNTRIES (ESTIMATED NUMBER OF AMPOULES PER 1,000 INHABITANTS).....</i>	<i>92</i>
Recombinant Follicle-Stimulating Hormones.....	92
Recombinant Follicle-...(Continued).....	93
Gonadotropin, Chorionic.....	94
Gonadotropin-Releasing Hormone Antagonist.....	95
Luteinizing Hormone-Releasing Hormone Antagonist.....	95
Goserelin Acetate.....	96
Leuprolide Acetate.....	96
Menotropins.....	97
Nafarelin Acetate.....	98
Ovidrel/Ovitrelle.....	98
Progesterone.....	98
Progesterone (Continued).....	99
Quinestrol.....	100
Urofollitropin.....	100
The Global Market for Fertility Drugs.....	101
<i>TABLE 37 GLOBAL SALES OF SELECTED FERTILITY DRUGS, THROUGH 2011.....</i>	<i>102</i>

<i>TABLE 38 GEOGRAPHIC SHARES OF INFERTILITY</i>	
<i>PHARMACEUTICALS, THROUGH 2011 (\$ MILLIONS)</i>	102
Leading Global Marketers of Fertility Drugs.....	102
<i>FIGURE 8 INFERTILITY DRUGS: GLOBAL SUPPLIER MARKET</i>	
<i>SHARES, 2005 (PERCENT)</i>	103
Fertility Drugs in Development.....	104
<i>TABLE 39 FERTILITY DRUGS IN PHASE II OR LATER</i>	
<i>DEVELOPMENT</i>	104
FSH-CTP	104
Visanne.....	105
Vitropin	105
Ovarian Implants as a Treatment for Infertility	105
THYROID DISEASE	106
HYPERTHYROIDISM	107
Drugs Used to Treat Hyperthyroidism.....	108
The Market for Drugs to Treat Hyperthyroidism	109
<i>TABLE 40 GLOBAL MARKET FOR PRODUCTS TO TREAT</i>	
<i>HYPERTHYROIDISM, THROUGH 2011 (\$ MILLIONS)</i>	109
Products in Development for the Treatment of	
Hyperthyroidism	110
HYPOTHYROIDISM	110
Drugs Used to Treat Hypothyroidism	111
<i>TABLE 41 DRUGS USED TO TREAT HYPOTHYROIDISM</i>	112
Levothyroxine	112
Liothyronine.....	112
Liotrix.....	113
Natural Thyroid	113
Synthroid Gains FDA Approval Decades After	
its Market Introduction	113
The Market for Prescription Drugs to Treat	
Hypothyroidism.....	114
<i>TABLE 42 GLOBAL SALES OF SELECTED DRUGS TO TREAT</i>	
<i>HYPOTHYROIDISM, THROUGH 2011</i>	114
Prescription Products in Development for the Treatment	
of Hypothyroidism.....	114
METABOLIC DISEASES — APPLICATIONS AND PRODUCTS	115
HYPERCHOLESTEROLEMIA	115
PRESCRIPTION DRUGS FOR THE TREATMENT OF	
HYPERCHOLESTEROLEMIA	115
<i>TABLE 43 CLASSES OF LIPID-LOWERING DRUGS</i>	115
<i>TABLE 43 (CONTINUED)</i>	116
Bile Acid-Binding Resins.....	117
Hydroxymethylglutaryl-CoA Reductase Inhibitors	117
U.S. Marketed Statin Drugs.....	117

<i>TABLE 44 STATIN DRUGS AVAILABLE GLOBALLY AND THEIR GENERIC AVAILABILITY IN THE U.S.</i>	118
Fibric Acids	118
Nicotinic Acid and Derivatives.....	118
Probucol.....	119
Currently Marketed Antihyperlipidemic Drugs	119
<i>TABLE 45 ANTIHYPERLIPIDEMIC DRUGS ON THE MARKET</i>	119
<i>TABLE 45 (CONTINUED)</i>	120
Leading Products	120
Combination Products	121
Research and Development	121
Statin Drugs Show Promise in Treating	
Prostate Cancer	121
The Entry of Generic Versions of Blockbuster	
Cholesterol Drugs.....	121
Blockbuster Cholesterol Drugs (Continued).....	122
The Medicare (Part D) Drug Benefit and Statin	
Drugs.....	123
THE MARKET FOR PRESCRIPTION DRUGS TO TREAT	
HYPERCHOLESTEROLEMIA.....	123
<i>TABLE 46 GLOBAL MARKET FOR PRODUCTS TO TREAT HYPERCHOLESTEROLEMIA BY PRODUCT, THROUGH 2011 (\$ MILLIONS)</i>	124
<i>TABLE 47 U.S. MARKET FOR PRODUCTS TO TREAT HYPERCHOLESTEROLEMIA, THROUGH 2011 (\$ MILLIONS)</i>	124
PRODUCTS IN DEVELOPMENT FOR THE TREATMENT OF	
HYPERCHOLESTEROLEMIA	125
<i>TABLE 48 SELECTED DRUGS IN PHASE II OR LATER DEVELOPMENT FOR THE TREATMENT OF HYPERCHOLESTEROLEMIA AND RELATED CONDITIONS</i>	125
AGI-1067	126
Avasimibe.....	126
CETi-1	127
ETC-216	127
ETC-588	127
ETC-642	128
FM-VP4	128
KS 01-019.....	128
Lipitor/Torcetrapib	128
MK-524B.....	129
OBESITY	129
MARKETED DRUGS FOR THE TREATMENT OF OBESITY.....	129
Meridia	129
Xenical.....	130

Other Products.....	130
THE MARKET FOR DRUGS TO TREAT OBESITY	131
TABLE 49 GLOBAL MARKET FOR PRESCRIPTION PRODUCTS TO TREAT OBESITY BY PRODUCT, THROUGH 2011 (\$ MILLIONS).....	131
TABLE 50 U.S. MARKET FOR PRESCRIPTION PRODUCTS TO TREAT OBESITY, THROUGH 2011 (\$ MILLIONS).....	132
DRUGS IN DEVELOPMENT FOR THE TREATMENT OF OBESITY	132
Cannabinoid (CB1) Antagonists	133
TABLE 51 DRUGS IN PHASE II OR LATER DEVELOPMENT FOR THE TREATMENT OF OBESITY.....	134
Acomplia.....	134
ADP356	136
AOD9604	137
ATL-962	137
Cetilistat	137
CP 945598	137
GI 181771.....	138
HMR 1426	138
P 57.....	138
Peptide YY3-36	138
S-2367.....	138
Symlin	139
Tesofensine	139
TM30338	140
Drugs for Other Indications Prescribed Off-Label for the Treatment of Obesity	140
Discontinued Products in Development	140
GlaxoSmithKline Submits Application for an Over- the-Counter Version of Xenical.....	140
COMPANY PROFILES	141
ABBOTT LABORATORIES.....	141
BUSINESS OVERVIEW.....	141
FINANCIAL INFORMATION.....	141
PRODUCTS	141
CORPORATE STRATEGY	142
AMYLIN PHARMACEUTICALS, INC.	142
BUSINESS OVERVIEW.....	143
FINANCIAL INFORMATION.....	143
PRODUCTS	143
CORPORATE STRATEGY	144
ARENA PHARMACEUTICALS, INC.	144
BUSINESS OVERVIEW.....	145
FINANCIAL INFORMATION.....	145

PRODUCTS	145
<i>TABLE 52 ARENA PHARMACEUTICALS DRUG-DEVELOPMENT</i>	
<i>PIPELINE</i>	<i>146</i>
CORPORATE STRATEGY	146
ATHEROGENICS, INC.	147
BUSINESS OVERVIEW.....	147
FINANCIAL INFORMATION.....	147
PRODUCTS	147
CORPORATE STRATEGY	148
BRISTOL-MYERS SQUIBB	149
BUSINESS OVERVIEW.....	149
FINANCIAL INFORMATION.....	149
PRODUCTS	149
CORPORATE STRATEGY	150
FERRING PHARMACEUTICALS AS	150
BUSINESS OVERVIEW.....	150
CORPORATE STRATEGY	151
GLAXOSMITHKLINE, PLC	151
BUSINESS OVERVIEW.....	151
FINANCIAL INFORMATION.....	152
PRODUCTS.....	152
KING PHARMACEUTICALS, INC.	152
BUSINESS OVERVIEW.....	152
FINANCIAL INFORMATION.....	152
PRODUCTS	153
CORPORATE STRATEGY	153
KOS PHARMACEUTICALS, INC.	154
BUSINESS OVERVIEW.....	154
PRODUCTS	154
CORPORATE STRATEGY	155
MERCK & COMPANY, INC.....	156
BUSINESS OVERVIEW.....	156
FINANCIAL INFORMATION.....	156
PRODUCTS	156
<i>TABLE 53 MERCK'S DRUGS IN PHASE II OR LATER DEVELOPMENT...</i>	<i>157</i>
CORPORATE STRATEGY	157
MYOGEN, INC.....	158
BUSINESS OVERVIEW.....	158
FINANCIAL INFORMATION.....	158
PRODUCTS	159
CORPORATE STRATEGY	159
NOVARTIS AG	160
BUSINESS OVERVIEW.....	160
FINANCIAL INFORMATION.....	161

PRODUCTS	161
CORPORATE STRATEGY	161
ORGANON INTERNATIONAL	161
BUSINESS OVERVIEW	162
PRODUCTS	162
CORPORATE STRATEGY	162
PFIZER CORP	162
BUSINESS OVERVIEW	162
FINANCIAL INFORMATION	163
PRODUCTS	163
CORPORATE STRATEGY	163
SCHERING-PLOUGH CORP	164
BUSINESS OVERVIEW	164
FINANCIAL INFORMATION	165
PRODUCTS	165
CORPORATE STRATEGY	165
SERONO S.A.	165
BUSINESS OVERVIEW	166
FINANCIAL INFORMATION	166
PRODUCTS	166
<i>TABLE 54 SERONO PRODUCTS IN PHASE II OR LATER</i>	
<i>DEVELOPMENT</i>	<i>167</i>
CORPORATE STRATEGY	167