

## Table of Contents

|  |           |
|--|-----------|
| <b>CHAPTER 1 Introduction</b>                  | <b>23</b> |
| 1.1 What is this report about?                 | 23        |
| 1.2 Who is the target reader?                  | 23        |
| 1.3 How to use this report                     | 23        |
| 1.4 Definitions                                | 24        |
| <b>CHAPTER 2 Global Biotechnology</b>          | <b>25</b> |
| 2.1 Market Overview                            | 25        |
| 2.2 Market Value                               | 26        |
| 2.3 Market Segmentation I                      | 27        |
| 2.4 Market Segmentation II                     | 28        |
| 2.5 Five Forces Analysis                       | 29        |
| 2.6 Market Forecasts                           | 35        |
| <b>CHAPTER 3 Biotechnology in Asia-Pacific</b> | <b>36</b> |
| 3.1 Market Overview                            | 36        |
| 3.2 Market Value                               | 37        |
| 3.3 Market Segmentation I                      | 38        |
| 3.4 Market Segmentation II                     | 39        |
| 3.5 Five Forces Analysis                       | 40        |
| 3.6 Market Forecasts                           | 46        |
| <b>CHAPTER 4 Biotechnology in Europe</b>       | <b>47</b> |
| 4.1 Market Overview                            | 47        |

|            |   |           |
|------------|---|-----------|
| <b>4.2</b> | <b>Market Value</b>                       | <b>48</b> |
| <b>4.3</b> | <b>Market Segmentation I</b>              | <b>49</b> |
| <b>4.4</b> | <b>Market Segmentation II</b>             | <b>50</b> |
| <b>4.5</b> | <b>Five Forces Analysis</b>               | <b>51</b> |
| <b>4.6</b> | <b>Market Forecasts</b>                   | <b>57</b> |
| <b>4.7</b> | <b>Demographics</b>                       | <b>58</b> |
|            | <b>CHAPTER 5 Biotechnology in Belgium</b> | <b>59</b> |
| <b>5.1</b> | <b>Market Overview</b>                    | <b>59</b> |
| <b>5.2</b> | <b>Market Value</b>                       | <b>60</b> |
| <b>5.3</b> | <b>Market Segmentation I</b>              | <b>61</b> |
| <b>5.4</b> | <b>Market Segmentation II</b>             | <b>62</b> |
| <b>5.5</b> | <b>Five Forces Analysis</b>               | <b>63</b> |
| <b>5.6</b> | <b>Market Forecasts</b>                   | <b>69</b> |
| <b>5.7</b> | <b>Demographics</b>                       | <b>70</b> |
|            | <b>CHAPTER 6 Biotechnology in Canada</b>  | <b>72</b> |
| <b>6.1</b> | <b>Market Overview</b>                    | <b>72</b> |
| <b>6.2</b> | <b>Market Value</b>                       | <b>73</b> |
| <b>6.3</b> | <b>Market Segmentation I</b>              | <b>74</b> |
| <b>6.4</b> | <b>Market Segmentation II</b>             | <b>75</b> |
| <b>6.5</b> | <b>Five Forces Analysis</b>               | <b>76</b> |
| <b>6.6</b> | <b>Market Forecasts</b>                   | <b>82</b> |
| <b>6.7</b> | <b>Demographics</b>                       | <b>83</b> |
|            | <b>CHAPTER 7 Biotechnology in China</b>   | <b>85</b> |

|            |   |            |
|------------|---|------------|
| <b>7.1</b> | <b>Market Overview</b>                    | <b>85</b>  |
| <b>7.2</b> | <b>Market Value</b>                       | <b>86</b>  |
| <b>7.3</b> | <b>Market Segmentation I</b>              | <b>87</b>  |
| <b>7.4</b> | <b>Market Segmentation II</b>             | <b>88</b>  |
| <b>7.5</b> | <b>Five Forces Analysis</b>               | <b>89</b>  |
| <b>7.6</b> | <b>Market Forecasts</b>                   | <b>95</b>  |
| <b>7.7</b> | <b>Demographics</b>                       | <b>96</b>  |
|            | <b>CHAPTER 8 Biotechnology in France</b>  | <b>98</b>  |
| <b>8.1</b> | <b>Market Overview</b>                    | <b>98</b>  |
| <b>8.2</b> | <b>Market Value</b>                       | <b>99</b>  |
| <b>8.3</b> | <b>Market Segmentation I</b>              | <b>100</b> |
| <b>8.4</b> | <b>Market Segmentation II</b>             | <b>101</b> |
| <b>8.5</b> | <b>Five Forces Analysis</b>               | <b>102</b> |
| <b>8.6</b> | <b>Market Forecasts</b>                   | <b>108</b> |
| <b>8.7</b> | <b>Demographics</b>                       | <b>109</b> |
|            | <b>CHAPTER 9 Biotechnology in Germany</b> | <b>111</b> |
| <b>9.1</b> | <b>Market Overview</b>                    | <b>111</b> |
| <b>9.2</b> | <b>Market Value</b>                       | <b>112</b> |
| <b>9.3</b> | <b>Market Segmentation I</b>              | <b>113</b> |
| <b>9.4</b> | <b>Market Segmentation II</b>             | <b>114</b> |
| <b>9.5</b> | <b>Five Forces Analysis</b>               | <b>115</b> |
| <b>9.6</b> | <b>Market Forecasts</b>                   | <b>121</b> |
| <b>9.7</b> | <b>Demographics</b>                       | <b>122</b> |

|                   |   |            |
|-------------------|---|------------|
| <b>CHAPTER 10</b> | <b>Biotechnology in Italy</b>           | <b>124</b> |
| 10.1              | Market Overview                         | 124        |
| 10.2              | Market Value                            | 125        |
| 10.3              | Market Segmentation I                   | 126        |
| 10.4              | Market Segmentation II                  | 127        |
| 10.5              | Five Forces Analysis                    | 128        |
| 10.6              | Market Forecasts                        | 134        |
| 10.7              | Demographics                            | 135        |
| <b>CHAPTER 11</b> | <b>Biotechnology in Japan</b>           | <b>137</b> |
| 11.1              | Market Overview                         | 137        |
| 11.2              | Market Value                            | 138        |
| 11.3              | Market Segmentation I                   | 139        |
| 11.4              | Market Segmentation II                  | 140        |
| 11.5              | Five Forces Analysis                    | 141        |
| 11.6              | Market Forecasts                        | 147        |
| 11.7              | Demographics                            | 148        |
| <b>CHAPTER 12</b> | <b>Biotechnology in the Netherlands</b> | <b>149</b> |
| 12.1              | Market Overview                         | 149        |
| 12.2              | Market Value                            | 150        |
| 12.3              | Market Segmentation I                   | 151        |
| 12.4              | Market Segmentation II                  | 152        |
| 12.5              | Five Forces Analysis                    | 153        |
| 12.6              | Market Forecasts                        | 159        |

|   |            |
|---|------------|
| 12.7 Demographics                                     | 160        |
| <b>CHAPTER 13 Biotechnology in Spain</b>              | <b>162</b> |
| 13.1 Market Overview                                  | 162        |
| 13.2 Market Value                                     | 163        |
| 13.3 Market Segmentation I                            | 164        |
| 13.4 Market Segmentation II                           | 165        |
| 13.5 Five Forces Analysis                             | 166        |
| 13.6 Market Forecasts                                 | 172        |
| 13.7 Demographics                                     | 173        |
| <b>CHAPTER 14 Biotechnology in the United Kingdom</b> | <b>175</b> |
| 14.1 Market Overview                                  | 175        |
| 14.2 Market Value                                     | 176        |
| 14.3 Market Segmentation I                            | 177        |
| 14.4 Market Segmentation II                           | 178        |
| 14.5 Five Forces Analysis                             | 179        |
| 14.6 Market Forecasts                                 | 185        |
| 14.7 Demographics                                     | 186        |
| <b>CHAPTER 15 Biotechnology in the United States</b>  | <b>188</b> |
| 15.1 Market Overview                                  | 188        |
| 15.2 Market Value                                     | 189        |
| 15.3 Market Segmentation I                            | 190        |
| 15.4 Market Segmentation II                           | 191        |
| 15.5 Five Forces Analysis                             | 192        |

|                                       |            |
|---------------------------------------|------------|
| <b>15.6 Market Forecasts</b>          | <b>198</b> |
| <b>15.7 Demographics</b>              | <b>199</b> |
| <b>CHAPTER 16 COMPANY PROFILES</b>    | <b>200</b> |
| <b>16.1 Leading Companies</b>         | <b>200</b> |
| <b>CHAPTER 17 Appendix</b>            | <b>207</b> |
| <b>17.1 Data Research Methodology</b> | <b>207</b> |

## List of Tables

|           |  |    |
|-----------|--|----|
| Table 1:  | Global Biotechnology Market Value: \$ million, 2003-2007.....                    | 26 |
| Table 2:  | Global Biotechnology Market Segmentation I: % Share, by Value, 2007.....         | 27 |
| Table 3:  | Global Biotechnology Market Segmentation II: % Share, by Value, 2007.....        | 28 |
| Table 4:  | Global Biotechnology Market Value Forecast: \$ million, 2007-2012.....           | 35 |
| Table 5:  | Asia-Pacific Biotechnology Market Value: \$ million, 2003-2007 .....             | 37 |
| Table 6:  | Asia-Pacific Biotechnology Market Segmentation I: % Share, by Value, 2007 .....  | 38 |
| Table 7:  | Asia-Pacific Biotechnology Market Segmentation II: % Share, by Value, 2007 ..... | 39 |
| Table 8:  | Asia-Pacific Biotechnology Market Value Forecast: \$ million, 2007-2012.....     | 46 |
| Table 9:  | Europe Biotechnology Market Value: \$ million, 2003-2007 .....                   | 48 |
| Table 10: | Europe Biotechnology Market Segmentation I: % Share, by Value, 2007.....         | 49 |
| Table 11: | Europe Biotechnology Market Segmentation II: % Share, by Value, 2007.....        | 50 |
| Table 12: | Europe Biotechnology Market Value Forecast: \$ million, 2007-2012 .....          | 57 |
| Table 13: | Europe Exchange Rate, 2003.....  | 58 |
| Table 14: | Belgium Biotechnology Market Value: \$ million, 2003-2007 .....                  | 60 |
| Table 15: | Belgium Biotechnology Market Segmentation I: % Share, by Value, 2007 .....       | 61 |
| Table 16: | Belgium Biotechnology Market Segmentation II: % Share, by Value, 2007 .....      | 62 |
| Table 17: | Belgium Biotechnology Market Value Forecast: \$ million, 2007-2012.....          | 69 |
| Table 18: | Belgium Size of Population (million) , 2003-2007.....                            | 70 |
| Table 19: | Belgium GDP (Constant 2000 Prices, \$ billion), 2003-2007.....                   | 70 |
| Table 20: | Belgium Inflation, 2003-2007 .....   | 70 |
| Table 21: | Belgium Exchange Rate, 2003 .....  | 71 |

|           |  |     |
|-----------|--|-----|
| Table 22: | Canada Biotechnology Market Value: \$ million, 2003-2007 .....             | 73  |
| Table 23: | Canada Biotechnology Market Segmentation I: % Share, by Value, 2007 .....  | 74  |
| Table 24: | Canada Biotechnology Market Segmentation II: % Share, by Value, 2007 ..... | 75  |
| Table 25: | Canada Biotechnology Market Value Forecast: \$ million, 2007-2012 .....    | 82  |
| Table 26: | Canada Size of Population (million) , 2003-2007 .....                      | 83  |
| Table 27: | Canada GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....             | 83  |
| Table 28: | Canada Inflation, 2003-2007 .....  | 83  |
| Table 29: | Canada Exchange Rate, 2003 .....   | 84  |
| Table 30: | China Biotechnology Market Value: \$ million, 2003-2007 .....              | 86  |
| Table 31: | China Biotechnology Market Segmentation I: % Share, by Value, 2007 .....   | 87  |
| Table 32: | China Biotechnology Market Segmentation II: % Share, by Value, 2007 .....  | 88  |
| Table 33: | China Biotechnology Market Value Forecast: \$ million, 2007-2012 .....     | 95  |
| Table 34: | China Size of Population (million) , 2003-2007 .....                       | 96  |
| Table 35: | China GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....              | 96  |
| Table 36: | China Inflation, 2003-2007 .....   | 96  |
| Table 37: | China Exchange Rate, 2003 .....  | 97  |
| Table 38: | France Biotechnology Market Value: \$ million, 2003-2007 .....             | 99  |
| Table 39: | France Biotechnology Market Segmentation I: % Share, by Value, 2007 .....  | 100 |
| Table 40: | France Biotechnology Market Segmentation II: % Share, by Value, 2007 ..... | 101 |
| Table 41: | France Biotechnology Market Value Forecast: \$ million, 2007-2012 .....    | 108 |
| Table 42: | France Size of Population (million) , 2003-2007 .....                      | 109 |
| Table 43: | France GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....             | 109 |
| Table 44: | France Inflation, 2003-2007 .....  | 109 |

|           |   |     |
|-----------|---|-----|
| Table 45: | France Exchange Rate, 2003 .....  | 110 |
| Table 46: | Germany Biotechnology Market Value: \$ million, 2003-2007 .....           | 112 |
| Table 47: | Germany Biotechnology Market Segmentation I: % Share, by Value, 2007....  | 113 |
| Table 48: | Germany Biotechnology Market Segmentation II: % Share, by Value, 2007...  | 114 |
| Table 49: | Germany Biotechnology Market Value Forecast: \$ million, 2007-2012 .....  | 121 |
| Table 50: | Germany Size of Population (million) , 2003-2007 .....                    | 122 |
| Table 51: | Germany GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....           | 122 |
| Table 52: | Germany Inflation, 2003-2007 .....  | 122 |
| Table 53: | Germany Exchange Rate, 2003 .....   | 123 |
| Table 54: | Italy Biotechnology Market Value: \$ million, 2003-2007 .....             | 125 |
| Table 55: | Italy Biotechnology Market Segmentation I: % Share, by Value, 2007 .....  | 126 |
| Table 56: | Italy Biotechnology Market Segmentation II: % Share, by Value, 2007 ..... | 127 |
| Table 57: | Italy Biotechnology Market Value Forecast: \$ million, 2007-2012 .....    | 134 |
| Table 58: | Italy Size of Population (million) , 2003-2007 .....                      | 135 |
| Table 59: | Italy GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....             | 135 |
| Table 60: | Italy Inflation, 2003-2007 .....  | 135 |
| Table 61: | Italy Exchange Rate, 2003 .....   | 136 |
| Table 62: | Japan Biotechnology Market Value: \$ million, 2003-2007 .....             | 138 |
| Table 63: | Japan Biotechnology Market Segmentation I: % Share, by Value, 2007 .....  | 139 |
| Table 64: | Japan Biotechnology Market Segmentation II: % Share, by Value, 2007 ..... | 140 |
| Table 65: | Japan Biotechnology Market Value Forecast: \$ million, 2007-2012 .....    | 147 |
| Table 66: | Japan Size of Population (million) , 2003-2007 .....                      | 148 |
| Table 67: | Japan GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....             | 148 |

|           |  |     |
|-----------|--|-----|
| Table 68: | Japan Exchange Rate, 2003.....   | 148 |
| Table 69: | Netherlands Biotechnology Market Value: \$ million, 2003-2007 .....                | 150 |
| Table 70: | Netherlands Biotechnology Market Segmentation I: % Share, by Value, 2007 .....     | 151 |
| Table 71: | Netherlands Biotechnology Market Segmentation II: % Share, by Value, 2007 .....    | 152 |
| Table 72: | Netherlands Biotechnology Market Value Forecast: \$ million, 2007-2012 .....       | 159 |
| Table 73: | Netherlands Size of Population (million) , 2003-2007 .....                         | 160 |
| Table 74: | Netherlands GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....                | 160 |
| Table 75: | Netherlands Inflation, 2003-2007 .....   | 160 |
| Table 76: | Netherlands Exchange Rate, 2003 .....  | 161 |
| Table 77: | Spain Biotechnology Market Value: \$ million, 2003-2007 .....                      | 163 |
| Table 78: | Spain Biotechnology Market Segmentation I: % Share, by Value, 2007 .....           | 164 |
| Table 79: | Spain Biotechnology Market Segmentation II: % Share, by Value, 2007 .....          | 165 |
| Table 80: | Spain Biotechnology Market Value Forecast: \$ million, 2007-2012 .....             | 172 |
| Table 81: | Spain Size of Population (million) , 2003-2007 .....                               | 173 |
| Table 82: | Spain GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....                      | 173 |
| Table 83: | Spain Inflation, 2003-2007 .....   | 173 |
| Table 84: | Spain Exchange Rate, 2003 .....  | 174 |
| Table 85: | United Kingdom Biotechnology Market Value: \$ million, 2003-2007 .....             | 176 |
| Table 86: | United Kingdom Biotechnology Market Segmentation I: % Share, by Value, 2007 .....  | 177 |
| Table 87: | United Kingdom Biotechnology Market Segmentation II: % Share, by Value, 2007 ..... | 178 |
| Table 88: | United Kingdom Biotechnology Market Value Forecast: \$ million, 2007-2012          | 185 |

|            |   |     |
|------------|---|-----|
| Table 89:  | United Kingdom Size of Population (million) , 2003-2007 .....                     | 186 |
| Table 90:  | United Kingdom GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....            | 186 |
| Table 91:  | United Kingdom Inflation, 2003-2007 .....   | 186 |
| Table 92:  | United Kingdom Exchange Rate, 2003 .....  | 187 |
| Table 93:  | United States Biotechnology Market Value: \$ million, 2003-2007 .....             | 189 |
| Table 94:  | United States Biotechnology Market Segmentation I: % Share, by Volume, 2007 ..... | 190 |
| Table 95:  | United States Biotechnology Market Segmentation II: % Share, by Value, 2007 ..    | 191 |
| Table 96:  | United States Biotechnology Market Value Forecast: \$ million, 2007-2012 ....     | 198 |
| Table 97:  | United States Size of Population (million) , 2003-2007 .....                      | 199 |
| Table 98:  | United States GDP (Constant 2000 Prices, \$ billion), 2003-2007 .....             | 199 |
| Table 99:  | United States Inflation, 2003-2007 .....  | 199 |
| Table 100: | Key Facts: Amgen Inc. ....  | 200 |
| Table 101: | Key Financials: Amgen Inc. ....   | 201 |
| Table 102: | Key Facts: Genentech, Inc. ....   | 202 |
| Table 103: | Key Financials: Genentech, Inc. ....  | 203 |
| Table 104: | Key Facts: Biogen Idec, Inc. ....   | 204 |
| Table 105: | Key Financials: Biogen Idec, Inc. ....  | 206 |

## List of Figures

|            |  |    |
|------------|--|----|
| Figure 1:  | Global Biotechnology Market Value: \$ million, 2003-2007 .....   | 26 |
| Figure 2:  | Global Biotechnology Market Segmentation I: % Share, by Value, 2007 .....                                  | 27 |
| Figure 3:  | Global Biotechnology Market Segmentation II: % Share, by Value, 2007 .....                                 | 28 |
| Figure 4:  | Forces Driving Competition in the Global Biotechnology Market, 2007 .....                                  | 29 |
| Figure 5:  | Drivers of Buyer Power in the Global Biotechnology Market, 2007 .....                                      | 30 |
| Figure 6:  | Drivers of Supplier Power in the Global Biotechnology Market, 2007 .....                                   | 31 |
| Figure 7:  | Factors Influencing the Likelihood of New Entrants in the Global Biotechnology Market, 2007 .....          | 32 |
| Figure 8:  | Factors Influencing the Threat of Substitutes in the MARKET NAME in COUNTRY, 2007 .....                    | 33 |
| Figure 9:  | Drivers of Degree of Rivalry in the Global Biotechnology Market, 2007 .....                                | 34 |
| Figure 10: | Global Biotechnology Market Value Forecast: \$ million, 2007-2012 .....                                    | 35 |
| Figure 11: | Asia-Pacific Biotechnology Market Value: \$ million, 2003-2007 .....                                       | 37 |
| Figure 12: | Asia-Pacific Biotechnology Market Segmentation I: % Share, by Value, 2007 ..                               | 38 |
| Figure 13: | Asia-Pacific Biotechnology Market Segmentation II: % Share, by Value, 2007 ..                              | 39 |
| Figure 14: | Forces Driving Competition in the Biotechnology Market in Asia-Pacific, 2007 ..                            | 40 |
| Figure 15: | Drivers of Buyer Power in the Biotechnology Market in Asia-Pacific, 2007 .....                             | 41 |
| Figure 16: | Drivers of Supplier Power in the Biotechnology Market in Asia-Pacific, 2007 ...                            | 42 |
| Figure 17: | Factors Influencing the Likelihood of New Entrants in the Biotechnology Market in Asia-Pacific, 2007 ..... | 43 |
| Figure 18: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in Asia-Pacific, 2007 .....      | 44 |
| Figure 19: | Drivers of Degree of Rivalry in the Biotechnology Market in Asia-Pacific, 2007 ..                          | 45 |

|            |   |    |
|------------|---|----|
| Figure 20: | Asia-Pacific Biotechnology Market Value Forecast: \$ million, 2007-2012 .....                         | 46 |
| Figure 21: | Europe Biotechnology Market Value: \$ million, 2003-2007 .....  | 48 |
| Figure 22: | Europe Biotechnology Market Segmentation I: % Share, by Value, 2007 .....                             | 49 |
| Figure 23: | Europe Biotechnology Market Segmentation II: % Share, by Value, 2007 .....                            | 50 |
| Figure 24: | Forces Driving Competition in the Biotechnology market in Europe, 2007 .....                          | 51 |
| Figure 25: | Drivers of Buyer Power in the Biotechnology market in Europe, 2007 .....                              | 52 |
| Figure 26: | Drivers of Supplier Power in the Biotechnology market in Europe, 2007 .....                           | 53 |
| Figure 27: | Factors Influencing the Likelihood of New Entrants in the Biotechnology market in Europe, 2007 .....  | 54 |
| Figure 28: | Factors Influencing the Threat of Substitutes in the Biotechnology market in Europe, 2007 .....       | 55 |
| Figure 29: | Drivers of Degree of Rivalry in the Biotechnology market in Europe, 2007 .....                        | 56 |
| Figure 30: | Europe Biotechnology Market Value Forecast: \$ million, 2007-2012 .....                               | 57 |
| Figure 31: | Belgium Biotechnology Market Value: \$ million, 2003-2007 .....                                       | 60 |
| Figure 32: | Belgium Biotechnology Market Segmentation I: % Share, by Value, 2007 .....                            | 61 |
| Figure 33: | Belgium Biotechnology Market Segmentation II: % Share, by Value, 2007 .....                           | 62 |
| Figure 34: | Forces Driving Competition in the Biotechnology Market in Belgium, 2007 .....                         | 63 |
| Figure 35: | Drivers of Buyer Power in the Biotechnology Market in Belgium, 2007 .....                             | 64 |
| Figure 36: | Drivers of Supplier Power in the Biotechnology Market in Belgium, 2007 .....                          | 65 |
| Figure 37: | Factors Influencing the Likelihood of New Entrants in the Biotechnology Market in Belgium, 2007 ..... | 66 |
| Figure 38: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in Belgium, 2007 .....      | 67 |
| Figure 39: | Drivers of Degree of Rivalry in the Biotechnology Market in Belgium, 2007 .....                       | 68 |
| Figure 40: | Belgium Biotechnology Market Value Forecast: \$ million, 2007-2012 .....                              | 69 |

|            |  |    |
|------------|--|----|
| Figure 41: | Canada Biotechnology Market Value: \$ million, 2003-2007 .....   | 73 |
| Figure 42: | Canada Biotechnology Market Segmentation I: % Share, by Value, 2007 .....                              | 74 |
| Figure 43: | Canada Biotechnology Market Segmentation II: % Share, by Value, 2007 .....                             | 75 |
| Figure 44: | Forces Driving Competition in the Biotechnology Market in Canada, 2007 .....                           | 76 |
| Figure 45: | Drivers of Buyer Power in the Biotechnology Market in Canada, 2007 .....                               | 77 |
| Figure 46: | Drivers of Supplier Power in the Biotechnology Market in Canada, 2007 .....                            | 78 |
| Figure 47: | Factors Influencing the Likelihood of New Entrants in the Biotechnology Market<br>in Canada, 2007..... | 79 |
| Figure 48: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in<br>Canada, 2007 .....     | 80 |
| Figure 49: | Drivers of Degree of Rivalry in the Biotechnology Market in Canada, 2007 .....                         | 81 |
| Figure 50: | Canada Biotechnology Market Value Forecast: \$ million, 2007-2012 .....                                | 82 |
| Figure 51: | China Biotechnology Market Value: \$ million, 2003-2007 .....  | 86 |
| Figure 52: | China Biotechnology Market Segmentation I: % Share, by Value, 2007 .....                               | 87 |
| Figure 53: | China Biotechnology Market Segmentation II: % Share, by Value, 2007 .....                              | 88 |
| Figure 54: | Forces Driving Competition in the Biotechnology Market in China, 2007.....                             | 89 |
| Figure 55: | Drivers of Buyer Power in the Biotechnology Market in China, 2007 .....                                | 90 |
| Figure 56: | Drivers of Supplier Power in the Biotechnology Market in China, 2007.....                              | 91 |
| Figure 57: | Factors Influencing the Likelihood of New Entrants in the Biotechnology Market<br>in China, 2007.....  | 92 |
| Figure 58: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in<br>China, 2007 .....      | 93 |
| Figure 59: | Drivers of Degree of Rivalry in the Biotechnology Market in China, 2007 .....                          | 94 |
| Figure 60: | China Biotechnology Market Value Forecast: \$ million, 2007-2012 .....                                 | 95 |
| Figure 61: | France Biotechnology Market Value: \$ million, 2003-2007 .....   | 99 |

|            |   |     |
|------------|---|-----|
| Figure 62: | France Biotechnology Market Segmentation I: % Share, by Value, 2007 .....                             | 100 |
| Figure 63: | France Biotechnology Market Segmentation II: % Share, by Value, 2007 .....                            | 101 |
| Figure 64: | Forces Driving Competition in the Biotechnology Market in France, 2007 .....                          | 102 |
| Figure 65: | Drivers of Buyer Power in the Biotechnology Market in France, 2007.....                               | 103 |
| Figure 66: | Drivers of Supplier Power in the Biotechnology Market in France, 2007.....                            | 104 |
| Figure 67: | Factors Influencing the Likelihood of New Entrants in the Biotechnology Market in France, 2007 .....  | 105 |
| Figure 68: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in France, 2007.....        | 106 |
| Figure 69: | Drivers of Degree of Rivalry in the Biotechnology Market in France, 2007 .....                        | 107 |
| Figure 70: | France Biotechnology Market Value Forecast: \$ million, 2007-2012.....                                | 108 |
| Figure 71: | Germany Biotechnology Market Value: \$ million, 2003-2007.....  | 112 |
| Figure 72: | Germany Biotechnology Market Segmentation I: % Share, by Value, 2007....                              | 113 |
| Figure 73: | Germany Biotechnology Market Segmentation II: % Share, by Value, 2007...                              | 114 |
| Figure 74: | Forces Driving Competition in the Biotechnology Market in Germany, 2007...                            | 115 |
| Figure 75: | Drivers of Buyer Power in the Biotechnology Market in Germany, 2007 .....                             | 116 |
| Figure 76: | Drivers of Supplier Power in the Biotechnology Market in Germany, 2007 .....                          | 117 |
| Figure 77: | Factors Influencing the Likelihood of New Entrants in the Biotechnology Market in Germany, 2007 ..... | 118 |
| Figure 78: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in Germany, 2007 .....      | 119 |
| Figure 79: | Drivers of Degree of Rivalry in the Biotechnology Market in Germany, 2007 ..                          | 120 |
| Figure 80: | Germany Biotechnology Market Value Forecast: \$ million, 2007-2012.....                               | 121 |
| Figure 81: | Italy Biotechnology Market Value: \$ million, 2003-2007 .....   | 125 |
| Figure 82: | Italy Biotechnology Market Segmentation I: % Share, by Value, 2007.....                               | 126 |

|             |  |     |
|-------------|--|-----|
| Figure 83:  | Italy Biotechnology Market Segmentation II: % Share, by Value, 2007 .....                              | 127 |
| Figure 84:  | Forces Driving Competition in the Biotechnology Market in Italy, 2007 .....                            | 128 |
| Figure 85:  | Drivers of Buyer Power in the Biotechnology Market in Italy, 2007 .....                                | 129 |
| Figure 86:  | Drivers of Supplier Power in the Biotechnology Market in Italy, 2007 .....                             | 130 |
| Figure 87:  | Factors Influencing the Likelihood of New Entrants in the Biotechnology Market<br>in Italy, 2007 ..... | 131 |
| Figure 88:  | Factors Influencing the Threat of Substitutes in the Biotechnology Market in<br>Italy, 2007 .....      | 132 |
| Figure 89:  | Drivers of Degree of Rivalry in the Biotechnology Market in Italy, 2007 .....                          | 133 |
| Figure 90:  | Italy Biotechnology Market Value Forecast: \$ million, 2007-2012 .....                                 | 134 |
| Figure 91:  | Japan Biotechnology Market Value: \$ million, 2003-2007 .....  | 138 |
| Figure 92:  | Japan Biotechnology Market Segmentation I: % Share, by Value, 2007 .....                               | 139 |
| Figure 93:  | Japan Biotechnology Market Segmentation II: % Share, by Value, 2007 .....                              | 140 |
| Figure 94:  | Forces Driving Competition in the Biotechnology Market in Japan, 2007 .....                            | 141 |
| Figure 95:  | Drivers of Buyer Power in the Biotechnology Market in Japan, 2007 .....                                | 142 |
| Figure 96:  | Drivers of Supplier Power in the Biotechnology Market in Japan, 2007 .....                             | 143 |
| Figure 97:  | Factors Influencing the Likelihood of New Entrants in the Biotechnology Market<br>in Japan, 2007 ..... | 144 |
| Figure 98:  | Factors Influencing the Threat of Substitutes in the Biotechnology Market in<br>Japan, 2007 .....      | 145 |
| Figure 99:  | Drivers of Degree of Rivalry in the MARKET NAME in COUNTRY, 2007 .....                                 | 146 |
| Figure 100: | Japan Biotechnology Market Value Forecast: \$ million, 2007-2012 .....                                 | 147 |
| Figure 101: | Netherlands Biotechnology Market Value: \$ million, 2003-2007 .....                                    | 150 |
| Figure 102: | Netherlands Biotechnology Market Segmentation I: % Share, by Value, 2007..<br>.....                    | 151 |

|             |  |     |
|-------------|--|-----|
| Figure 103: | Netherlands Biotechnology Market Segmentation II: % Share, by Value, 2007.<br>.....                              | 152 |
| Figure 104: | Forces Driving Competition in the Biotechnology Market in the Netherlands,<br>2007<br>.....                      | 153 |
| Figure 105: | Drivers of Buyer Power in the Biotechnology Market in the Netherlands, 2007.<br>.....                            | 154 |
| Figure 106: | Drivers of Supplier Power in the Biotechnology Market in the Netherlands,<br>2007<br>.....                       | 155 |
| Figure 107: | Factors Influencing the Likelihood of New Entrants in the Biotechnology<br>Market in the Netherlands, 2007 ..... | 156 |
| Figure 108: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in<br>the Netherlands, 2007.....       | 157 |
| Figure 109: | Drivers of Degree of Rivalry in the Biotechnology Market in the Netherlands,<br>2007<br>.....                    | 158 |
| Figure 110: | Netherlands Biotechnology Market Value Forecast: \$ million, 2007-2012...  | 159 |
| Figure 111: | Spain Biotechnology Market Value: \$ million, 2003-2007 .....  | 163 |
| Figure 112: | Spain Biotechnology Market Segmentation I: % Share, by Value, 2007.....  | 164 |
| Figure 113: | Spain Biotechnology Market Segmentation II: % Share, by Value, 2007.....   | 165 |
| Figure 114: | Forces Driving Competition in the Biotechnology Market in Spain, 2007.....                                       | 166 |
| Figure 115: | Drivers of Buyer Power in the Biotechnology Market in Spain, 2007 .....  | 167 |
| Figure 116: | Drivers of Supplier Power in the Biotechnology Market in Spain, 2007 .....                                       | 168 |
| Figure 117: | Factors Influencing the Likelihood of New Entrants in the Biotechnology<br>Market in Spain, 2007 .....           | 169 |
| Figure 118: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in<br>Spain, 2007.....                 | 170 |
| Figure 119: | Drivers of Degree of Rivalry in the Biotechnology Market in Spain, 2007....                                      | 171 |
| Figure 120: | Spain Biotechnology Market Value Forecast: \$ million, 2007-2012.....  | 172 |

|             |   |     |
|-------------|---|-----|
| Figure 121: | United Kingdom Biotechnology Market Value: \$ million, 2003-2007.....                                   | 176 |
| Figure 122: | United Kingdom Biotechnology Market Segmentation I: % Share, by Value,<br>2007 .....                    | 177 |
| Figure 123: | United Kingdom Biotechnology Market Segmentation II: % Share, by Value,<br>2007 .....                   | 178 |
| Figure 124: | Forces Driving Competition in the Biotechnology Market in the UK, 2007 ...                              | 179 |
| Figure 125: | Drivers of Buyer Power in the Biotechnology Market in the UK, 2007 .....                                | 180 |
| Figure 126: | Drivers of Supplier Power in the Biotechnology Market in the UK, 2007 .....                             | 181 |
| Figure 127: | Factors Influencing the Likelihood of New Entrants in the Biotechnology<br>Market in the UK, 2007 ..... | 182 |
| Figure 128: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in<br>the UK, 2007 .....      | 183 |
| Figure 129: | Drivers of Degree of Rivalry in the Biotechnology Market in the UK, 2007 ..                             | 184 |
| Figure 130: | United Kingdom Biotechnology Market Value Forecast: \$ million, 2007-2012...<br>.....                   | 185 |
| Figure 131: | United States Biotechnology Market Value: \$ million, 2003-2007 .....                                   | 189 |
| Figure 132: | United States Biotechnology Market Segmentation I: % Share, by Volume,<br>2007 .....                    | 190 |
| Figure 133: | United States Biotechnology Market Segmentation II: % Share, by Value,<br>2007 .....                    | 191 |
| Figure 134: | Forces Driving Competition in the Biotechnology Market in the US, 2007 ...                              | 192 |
| Figure 135: | Drivers of Buyer Power in the Biotechnology Market in the US, 2007 .....                                | 193 |
| Figure 136: | Drivers of Supplier Power in the Biotechnology Market in the US, 2007 .....                             | 194 |
| Figure 137: | Factors Influencing the Likelihood of New Entrants in the Biotechnology<br>Market in the US, 2007 ..... | 195 |
| Figure 138: | Factors Influencing the Threat of Substitutes in the Biotechnology Market in<br>the US, 2007 .....      | 196 |

Figure 139: Drivers of Degree of Rivalry in the Biotechnology Market in the US, 2007 .. 197

Figure 140: United States Biotechnology Market Value Forecast: \$ million, 2007-2012. 198

Figure 141: Revenues & Profitability: Amgen Inc. ....201

Figure 142: Revenues & Profitability: Genentech, Inc. ....203

Figure 143: Revenues & Profitability: Biogen Idec, Inc. ....206