



Smoking Cessation -Data, Analysis & Forecast to 2023

Pharmaceutical, Commercial & Strategic Developments in the Global Smoking Cessation Market 2013-2023

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GMR Data 2013

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Companies /Organisations Mentioned in this Report

22nd Century Group, Inc

Acrux

Alcon Inc

Altria Group Inc

Alza Corporation

American Lung Association and Cancer Advocacy Coalition of Canada

Aradigm Corporation

Biota Holdings Ltd

Biota Pharmaceuticals, Inc.

Birlaveda

British American Tobacco

Celtic Pharmaceuticals

Cipla

CN Creative

Cytos Biotechnology

Elder Pharmaceuticals limited

EverSmoke Electronic Cigarettes

Evotec AG

Extab Corporation

Frii Inc

GlaxoSmithKline

Green Smoke Inc

Imperial Tobacco

Independent Pharmaceutica AB

Institute of Human Behaviour & Allied Sciences

Invion Limited

Johnson & Johnson

KLOX Technologies

Lorillard Inc

McNeil

Nabi Biopharmaceuticals

NAL Pharmaceuticals

National Institute on Drug Abuse

Nicobrand

Niconovum AB

NJOY

Novartis

Nu Mark LLC

Perrigo

Pfizer Inc

Pure Cigs, LLC

Reynolds American Inc

RML Hospital and Chronic Care Foundation

Sandoz Pharmaceuticals

Selecta Biosciences, Inc

Shanghai Johnson & Johnson Pharmaceutical Ltd

Sopharma

South Beach Smoke

Sun Pharma

Taranabant, Merck & Co

Teva Pharmaceuticals

U.S. Preventive Services Task Force

University of Chicago

Vapor King

Volcano Fine Electronic Cigarettes

Watson Pharmaceuticals

White Cloud Electronic Cigarettes

Through reading this report you will gain the following knowledge:

- Acquire analysis of the state of the smoking cessation market in 2012 and a market forecast for the period 2013-2023. Market forecasts are also provided for key prescription smoking cessation drugs, key NRT OTC drugs and the emerging e-cigarette market
- Identify which companies are operating in the market, their current products and pipeline candidates
- Discover the strengths and weaknesses that exist in the smoking cessation market and the opportunities and threats facing market players during the period 2013-2023
- Acquire market forecasts for the primary markets, globally, in the smoking cessation market and ascertain how each market will develop across the forecast period of 2013-2023
- Read our interviews with 3 key global authorities in the smoking cessation market

1.2 Chapter Breakdown

The chapters in this report cover the following topics.

Chapter 1 is an executive summary.

Chapter 2 introduces smoking cessation, as well as describing the types of drugs or products that are currently available on the market.

Chapter 3 analyses the size of the global smoking cessation market, describing how the 2 key sub markets; Nicotine Replacement Therapy and Prescription Drugs, make up the market.

Chapter 4 provides analysis for the key global smoking cessation markets from 2013-2023. Estimated and potential markets are discussed, analysed and forecasted.

Chapter 5 analyses the Nicotine Replacement Therapies (NRT) Market across 2013-2023, providing key drug forecasts and expected developments within this important sub-market.

Chapter 6 analyses the Prescription Drug Market including forecasts for 2013 to 2023 & the key drugs that make up the market.

Chapter 7 discusses the leading companies operating in the smoking cessation market, looking at those with currently marketed therapies, as well as those with promising R&D pipeline products.

Chapter 8 provides an analysis of the strengths and weaknesses, opportunities and threats facing the smoking cessation market in the period 2013-2023. Our SWOT analysis identify where the market will head across the next decade.

Chapter 9 contains 3 exclusive, original transcripts of interviews conducted by GMR Data with authorities in the global smoking cessation market

1.3 Research and Analysis Methods

This report harnesses primary and secondary research. This study provides world market forecasts and analyses of market drivers and restraints (including SWOT and forecast analyses) and principal developments. We also provide geographical breakdowns of the world market. Our analyses are original, benefiting from our consulting experts in industry, academia, medical practice and other roles. Our analysts also refer to industry data, company reports, news and trade articles, public health data, policy documents and other analysts' views. We conduct primary research by telephone interviews, correspondence or face-to-face discussions.

Our report contains quantitative and qualitative analytical content, covering the present and future of healthcare markets. Although our report is market-centred, we include medical and technical information. We include analyses of under-met market needs from the present looking forward. Our revenue forecasting assesses the magnitude and effects of driving and restraining forces, to determine annual growth and total sales across a series of years. We base our forecasts upon knowledge of financial performance, disease prevalence, product/technology characteristics and other factors, as well as data and opinions gathered from our primary and secondary research.

Products and vendors listed in this report are provided for reference and constitute neither a complete list, necessarily, nor an endorsement of any specific vendor or product.

Revenue figures in this report are for the respective world market, or market segment, unless stated otherwise. Tabulated revenue values for later years (2013 onwards) are whole-year predictions (January to December). Because of rounding, values may not add up exactly. Compound annual growth rate (CAGR) values are for 2013-2023. In this report, all revenue figures and market values are expressed in USD, figures that did not originate in USD were worked out via current currency exchange rates, these rates are correct at point of publication they are, however, subject to change.

Table 4.8.1 Estimated Smoking Cessation Market Share for Selected Countries 2013, 2018 and 2023 (%)

Country	2013 Market Share	2018 Market Share	2023 Market Share
US	50%	XX%	XX%
UK	7%	XX%	XX%
France	8%	XX%	XX%
Germany	3%	XX%	XX%
Spain	3%	XX%	XX%
Italy	2%	XX%	XX%
Japan	4%	XX%	XX%
ROW	23%	XX%	XX%

GMR Data 2013

China and India, key markets in the ROW show huge tobacco use; 30% of India's population use tobacco, with similar figures in China. In 2013 India accounts for 10-12% of the ROW smoking cessation market, whilst China accounts for 15-18%. These markets provide a huge opportunity for increased smoking cessation product sales due to the high number of smokers.

Table 4.8.2 BRIC Population, GDP 2000 & 2010, CAGR & GDP per Capita 2000 & 2010 (\$/per annum)

	Brazil	Russia	India	China
Population (2012)	194m	142m	1.15bn	1.33bn
GDP 2010	\$1,988bn	\$1,232bn	\$1,310bn	\$4,985bn
GDP 2000	\$1,234bn	\$259bn	\$474bn	\$1,198bn
GDP Avg. Growth Rate 1990-2010	4.2%	4.5%	8.1%	9.5%
GDP Per Capita 2010	\$10,499	\$14,913	\$3,015	\$6,778
GDP Per Capita 2000	\$7,207	\$1,775	\$1,534	\$2,379

GMR Data 2013

The strong growth highlighted in table 4.8.2 (above) equate to increasing numbers of the BRIC countries' population moving into the middle class income bracket of \$6,000 to \$30,000 (GDP per capita, per annum). As increasing numbers of the population move into the middle classes, evidence shows that the rate of annual doctor visits increase, annual spending on both prescription & OTC drugs increase and levels of health education increase.

India has a large population of smokers; 120m, which means that 10% of the world's smokers reside in India. This equates to over 1m people dying, per annum, due to diseases caused by tobacco.

Key facts for the Indian smoking cessation market;

- Key pharma companies supplying smoking cessation products in the Indian market include; Johnson & Johnson, GSK, Cipla, Sun Pharma, Elder Pharma and Birlaveda. Similarly to western countries' ranges of NRT products come in the form of gum, patches, inhalers, nasal sprays and lozenges. Gum products are the most popular NRT, in India, making up 23-25% of the revenue in the market. Market domination, allied with heavy advertising of J&J's Nicorette range in the market has made the Nicorette brand synonymous with smoking cessation in India.
