



**SOUND OUT THE MARKET
... GET INTO THE MARKET**

MARKET & BUSINESS INTELLIGENCE AND STRATEGY



Visit us at www.cbdt.com



CBDMT® - MARKET AND BUSINESS INTELLIGENCE

CBDMT links the innovation to the market by providing solutions to better characterize:

The Market Uncertainty

How large is the potential market?

The Technological Uncertainty

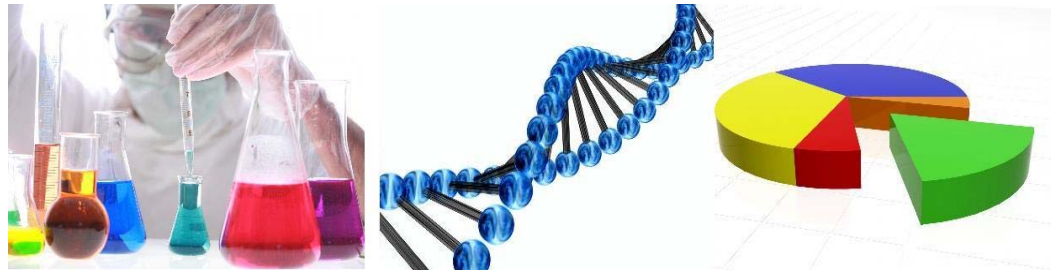
Will the new technology or innovation really make ours or others obsolete?

The Competitive Volatility

What products will we compete with?
Who will be the new competition in the future?
What competitive tactics will be needed?

CBDMT® assists companies in:

- BUSINESS DEVELOPMENT
- MARKET ANALYSIS—SURVEY
- MARKET SCOUTING
- INTELLIGENCE MARKETING STRATEGY
- INTERIM MANAGEMENT

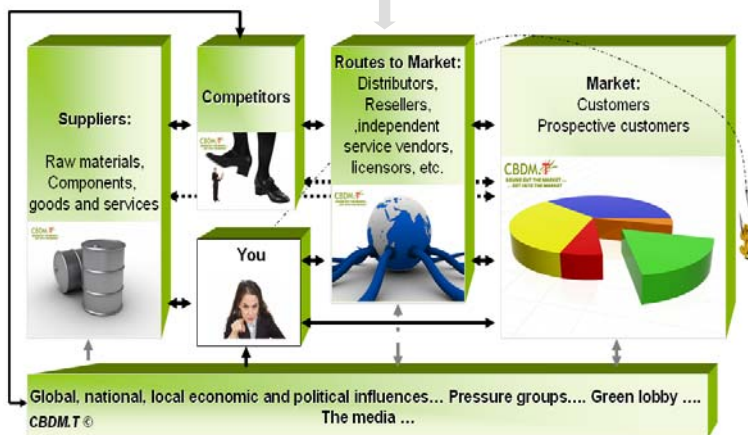


MARKETS:

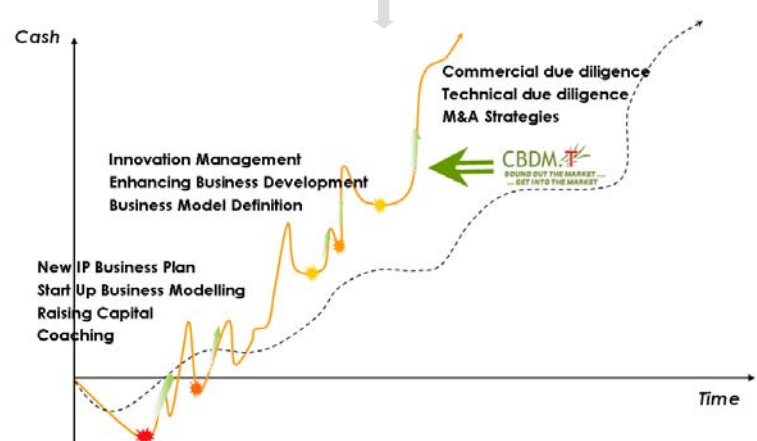
- BIOTECHNOLOGY
- PHARMACEUTICAL
- CHEMICAL INDUSTRY
- COSMETIC INDUSTRY
- LIFESCIENCE
- ENERGY



CBDMT® Business Mapping



CBDMT® Business Lifecycle contribution



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CBDMT® - MARKET AND BUSINESS INTELLIGENCE

CBDM.T® gives you access to

- More than 6500 contacts in Life science & Chemical Industries
- Databases with over 14000 drugs in development or marketed
 - Over 5500 company profiles
 - Market and business valuation tools
- More than 250 market surveys in Biotechnology, Healthcare, Drug and Discovery, Food and Drinks, Energy, Biomanufacturing, Pharmaceuticals, Dietary supplements, Health products, Nanotechnology fields

CBDM.T® last focus & market survey:

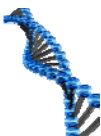


Drug Discovery

- RNAI
- BIOINFORMATICS
- FLAVOR AND FRAGRANCES
- PROTEOMICS ANALYSIS

- LEADING NANOTECHNOLOGY START-UP COMPANIES
- PROTEIN ENGINEERING
- BIOMARKER-BASED DIAGNOSTICS

- INFECTIOUS DISEASE
- AUTOMIMMUNE DISORDERS
- TRANSPLANTATION MARKET



Biotechnology

- BIOREMEDIATION
- DUE DILIGENCE
- GMO & MGM
- ENZYMES

- LICENSING AGREEMENT
- BIOPRODUCTION
- BIOCATALYSIS PLAYERS
- APPLICATION FOR COSMETICS

- NCE DEVELOPMENT
- ANTIBODY
- BIOFUELS
- BIOPOLYMER



Pharmaceutical

- POSTMARKETING CLINICAL RESEARCH (PHASE IV)
- LIFESTYLE DRUGS MARKET
- EMERGING MARKETS
- BIOSIMILARS
- AUTOIMMUNE MARKET

- HERPES MARKET
- CNS
- GENERICS
- PATENT PROTECTION STRATEGY
- OBESITY MARKET
- DIABETES (INNOVATION)

- INJECTABLE DRUG DELIVERY
- PULMONARY DRUG DELIVERY
- PRICING & REIMBURSEMENT IN USA, EU, JAPAN
- LEADING BIOTECH COMPANIES
- ALZHEIMER MARKET



Energy Environment

- CO2 SEQUESTRATION
- BIOFUELS
- SOLAR MARKET
- REMEDIATION

- GREEN ENERGY IN THE US
- NUCLEAR POWER
- GREEN ENERGY IN ASIA

- RENEWABLE ENERGY
- RENEWABLE ENERGY TARGETS
- CLEAN COAL



Consumer Goods

- ETHICAL PACKAGING
- FOOD AND DRINKS MARKET
- HEALTH AND VITALITY MARKET
- FLAVOR AND FRAGRANCES

- DAIRY PRODUCERS
- SPIRITS MARKET
- READY MEAL MARKET
- HEALTHY SNACK MARKET

- AMINO ACID MARKET
- NUTRACEUTICALS
- CHEM VERSUS BIO
- MEAT, FISH, POULTRY MARKET

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Green Biotechnology : Agricultural Biotechnology

Green biotechnology is biotechnology for agricultural applications. During the first dozen years of commercialization from 1996 to 2007, farmers have continued to plant more biotech crops every year. In 2007, the global area of biotech crops in industrial and developing countries reached almost 120 millions hectares. The global area more than doubled in the last five years. The number of countries planting biotech crops increased to 23, comprising 12 developing countries and 11 industrial countries:

In order of hectarage ; USA, Argentina, Brazil, Canada, India, China, Paraguay, South Africa, Uruguay, Philippines, Australia, Spain, Mexico, Colombia, Chile, France, Honduras, Czech Republic, Portugal, Germany, Slovakia, Romania and Poland.



Input traits:

The plant is modified to resist a certain insect, disease or the application of a crop protection agent.

Output traits:

- **Agronomic traits:** the plant is modified to withstand environmental stress (drought, cold, temperature etc.) or to produce higher yields
- **Plants as green factories:** the plant is modified to produce a valuable ingredient (specialty or bulk chemicals, enzymes etc.)

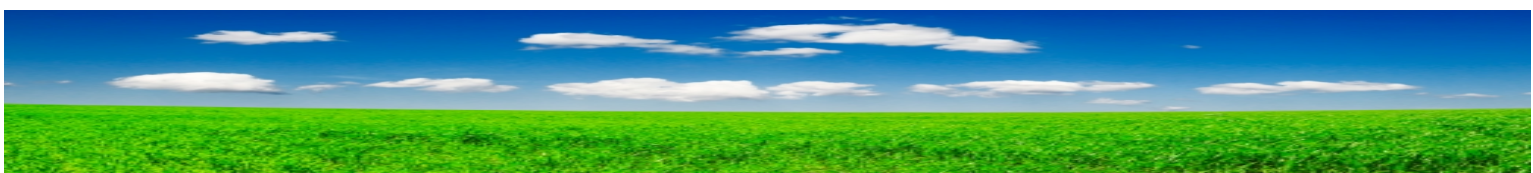
CBDM.T® last focus:

GM SOY PLANT-BASED TRANSGENIC COMPANIES AND THEIR PRODUCT PIPELINE

GM MAIZE MANUFACTURING OF BIOLOGICS BIOFUELS QUALITY

GM FOOD MARKET PLAYERS GLOBAL STATUS OF COMMERCIALIZED BIOTECH GM CROPS

PMP (PLANT MADE PHARMACEUTICALS)



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White Biotechnology : Industrial Biotechnology

White or industrial biotechnology, the use of biotechnology in industrial processes, is a dynamic market which is rapidly gaining priority on the agendas of industrial, political, academic and nongovernmental organizations. This is because white biotechnology offers enormous opportunities, not just for the economy, but equally to our environment and to our society.

Industrial biotechnology is mainly based on fermentation technology and biocatalysis. In a contained environment, genetically modified or non-GM micro-organisms (yeast, fungi, and bacteria) or cell lines from animal or human origin are cultivated in closed bioreactors to produce a variety of goods. Likewise enzymes, which are derived from these organisms, they are applied to catalyze a conversion in order to generate the desired products.

The application of nature's toolset to the production of bio-based chemicals, materials and fuels is key as it will:

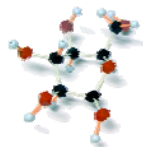
- Have a **strong impact on the environment** allowing substantial reductions of greenhouse gas (17%-65%), of emissions to water and to air and resource usage (renewable feedstock)
- Have an estimated **potential economic value** for the chemical industry alone of €11-22 billion by 2010-2012 (cost reduction, additional revenues and process efficiency increase)

CBDM.T® last focus:



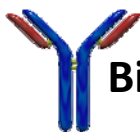
Biofuels

FIRST GENERATION	SECOND GENERATION		TECHNOLOGY
ENERGY DEMAND	ETHANOL	BIODIESEL	MARKET DRIVERS
MARKET SIZE	BIOMASS AND LAND AVAILABILITY		REGULATIONS



Bioproduction

ENZYME MARKET	EU PLAYERS	BIOCATALYSIS	BIOCONVERSION
OLIGONUCLEOTIDES	OUTSOURCING	BIOPLASTIC	MARKET DRIVERS
MARKET SIZE	CMO	EXPRESSION SYSTEMS	



Biopharmaceuticals

MICROBES	BIOLOGICS	INDUSTRY FORECASTS	TECHNOLOGY
MAMMALIAN CELL	OUTSOURCING	MARKET TRENDS	MARKET DRIVERS
MARKET SIZE	TRANSGENIC	RECOMBINANT THERAPEUTICS	

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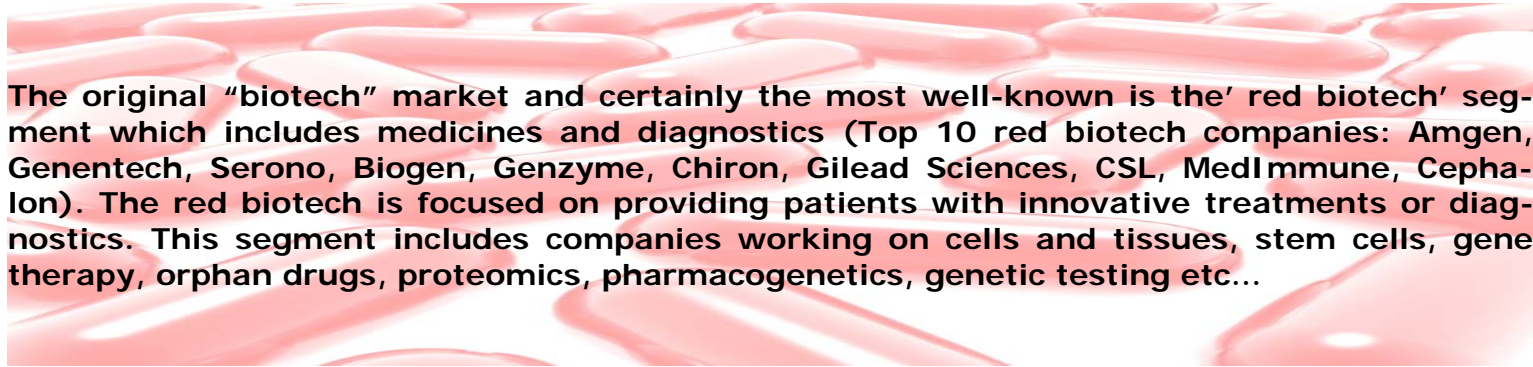
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Red Biotechnology : Healthcare Biotechnology



The original "biotech" market and certainly the most well-known is the 'red biotech' segment which includes medicines and diagnostics (Top 10 red biotech companies: Amgen, Genentech, Serono, Biogen, Genzyme, Chiron, Gilead Sciences, CSL, MedImmune, Cephalon). The red biotech is focused on providing patients with innovative treatments or diagnostics. This segment includes companies working on cells and tissues, stem cells, gene therapy, orphan drugs, proteomics, pharmacogenetics, genetic testing etc...

Modern biotechnology is applied in medicine and health care in therapeutics, mainly for the discovery, development and production of novel drugs, large molecules (biopharmaceuticals) but also small molecules, in preventives for the development of recombinant vaccines and in diagnostics, for protein- and nucleic acids based tests. The worldwide pharmaceutical market in 2007 was about \$698 billion USD (80% USA, EU and Japan). Biopharmaceuticals represented >10% of the corresponding pharmaceutical market.

CBDM.T® last focus:

IMMUNOMODULATORS	TOP BIOTECHS	DRUG DISCOVERY	FASTEST GROWING COMPANIES
BIOGENERICS	BIOMANUFACTURING	MARKET DRIVERS	PRODUCT PIPELINE
CRO MARKET	NANOTECHNOLOGY	BIOTECH IN CHINA	POST-GENOMIC ERA
VACCINE MARKET	METABOLOMICS	BIOINFORMATICS	STEM CELL
GENOMICS	BIOMARKERS	SMALL MOLECULES	EU BIOTECHNOLOGY
RNAI	BIOPARTNERING	PROTEIN ENGINEERING	DRUG DESIGN



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Pharmaceutical Industry

In a year of transition, global pharmaceutical sales are expecting to grow 5-6% to over 735 USD billion in 2008 (including generics), compared with 6-7 % in 2007, driven by the declining costs of drug treatment in major therapy areas, increased uncertainty over safety, pricing and market access, and intellectual property issues. There will also be a shift in growth from the top seven markets to emerging markets, and from primary care-driven to specialty care-driven drugs.

Fastest growing treatment categories :

- vaccines with over 15-18% per annum to 2011, driven by strong HPV vaccines (Cervarix, Gardasil), paediatric vaccines (Rotarix),
- HIV with an expected growth of 12-13% per annum driven by high prevalence, success of triple combination therapies and new launches,
- Neurodegeneration with a growth of 12-15% per annum driven by interferons, Copaxone and Tysabri.

CBDM.T® last focus:



Drug discovery

BIOMARKERS	BIOINFORMATICS	LEAD OPTIMIZATION
EMERGING TECHNOLOGIES		ADAPTIVE TRIALS
DRUG DEVELOPMENT IN CHINA		NANOTECHNOLOGY



Strategy

LICENSING	OUTSOURCING	ALLIANCES	LIFECYCLE
BRANDING	CONTRACT MANUFACTURING		R&D PRODUCTIVITY
CRO	GROWTH OPPORTUNITIES IN BRIC		



Markets

VACCINES	CNS	EMERGING MARKETS	TECHNOLOGY
CARDIOVASCULAR	HIV/AIDS	PRICING	ANTI-INFECTIVES
ALZHEIMER	GASTROINTESTINAL	DERMATOLOGY	CANCER



Other

MARKET VALUATION	NPV MODELS	PRODUCT PIPELINE ANALYSIS
INFORMATION AND COMMUNICATION TECHNOLOGIES IN HEALTHCARE		

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Biofuels

Over 80% of the world's primary energy supply is currently derived from coal, gas and oil. The combination of biomass and biofuels accounted for nearly 20% of the world's total renewable energy production in 2005. Biomass is distinguished from fossil fuels as it refers to energy or carbon source from biomaterial (vegetable, sugar cane, corn cobs etc.). Instead of biomass direct burning, a significant efficient way is to process biomaterials into solid, liquid or gas form to produce biofuels. In 2005, less than 1% of the world's fuel supply was derived from biofuels.



Biofuel Market Drivers

- Oil supply and demand (prices and volatility),
- Environmental concerns (emissions and sustainability)
- National interest (security of supply, strategic independence, rural development opportunity),
- Biotechnological progress (better enzymes and microorganisms).

CBDM.T® last focus:



R&D

- BIODIESEL FROM MICROALGAE
- BIOMASS PRETREATMENT
- MARINE BIOMASS PRODUCTION
- START-UP MAPPING IN BIOFUELS
- BIOMASS CONVERSION TECHNOLOGIES
- TRENDS



Strategy

- GREEN ENERGY FROM BIOMASS AND WASTE IN EUROPE
- BIOMASS SOURCES
- BIOFUELS INFRASTRUCTURE IN EUROPE



Markets

- BIOFUELS MARKET SIZE AND FORECASTS
- MARKET DRIVERS AND INHIBITORS
- BIOFUELS MARKET OUTLOOK
- GLOBAL ETHANOL PRODUCERS, 2005
- COST OF DISTRIBUTION



Other

- BIOFUELS POLICIES AND REGULATIONS
- BIOFUELS ENERGY TARGETS

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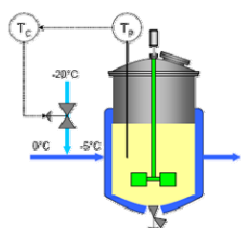
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Outsourcing in the pharmaceutical industry

With a global contract and manufacturing outsourcing (CMO) and contract research services (CRO) market up to \$30 USD billion, the outsourcing industry is growing at more than 10% per annum. The contract manufacturing sector is becoming increasingly important in the biopharmaceutical industry. Large companies are scaling back on production and focusing on core competencies, resulting of manufacturing activities. Biomanufacturing account for more than 10% of the CMO market. In an emerging business model, CMOs are engaged in both contract research and contract manufacturing. These dual models, which offer molecule synthesis from milligram to the multi-hundred-ton scale, are called Contract Research And Manufacturing Organizations (CRAMS).



outsourcing
Market
Drivers

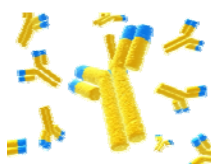
- Regulatory and financial pressures,
- Cost, lead time and resource savings,
- Expansion of biopharmaceutical markets,
- Restructuring of pharmaceutical production,
- Global shift of manufacturing activities from high-cost to low-cost regions.

CBDM.T® last focus:



Sourcing

DUE DILIGENCE	KEY FACTORS IN SELECTING AND MANAGING CMO
PRICING	SUPPLY CHAIN DEFINITION
SUPPLIERS MAPPING	INDIA AND CHINA EMERGING MARKETS



Biologics

CONTRACT BIOMANUFACTURING MARKET	EXPRESSION PLATFORMS
MARKET DRIVERS	WW PLAYERS
	MICROALGAE



CRO

OUTSOURCING BY PHASE	TRENDS	INDIA MARKET
MARKET OUTLOOK	US MARKET	CRO SERVICE MODELS
LEADING PLAYERS	EU MARKET	



CMO

BIOCATALYSIS PLAYERS	FINE CHEMICALS	PARTNERSHIP OPTIMIZATION
END MARKET ANALYSIS	BRAC OPPORTUNITIES	PRICING
		M&A

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