

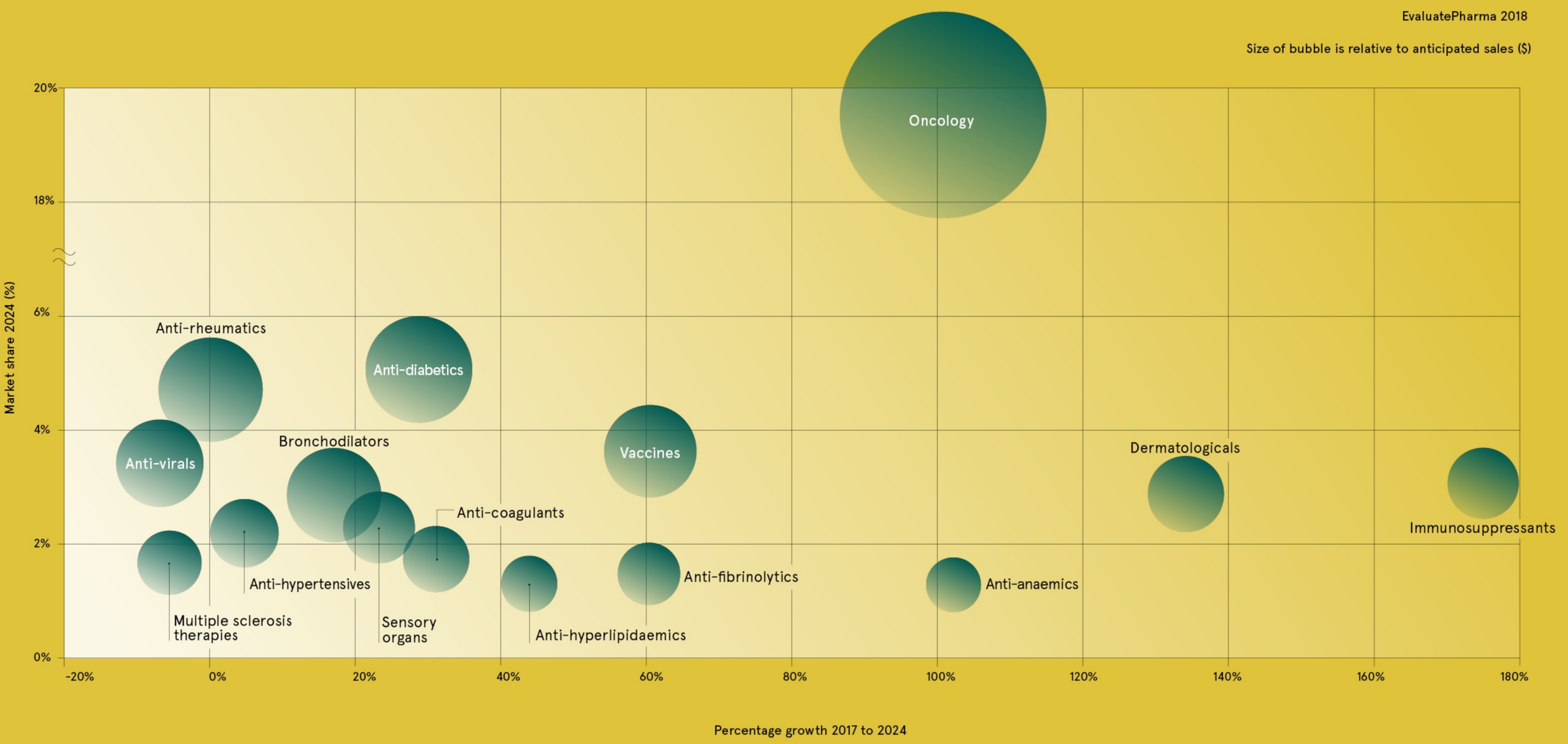
DRUGS MARKET OUTLOOK



Anticipating the most needed drug in the future is a key role of pharmaceutical companies and recent years have seen a big shift in focus to cancer treatments, which are expected to make up almost one fifth of all drug sales by 2024

Top ten therapy areas in 2024

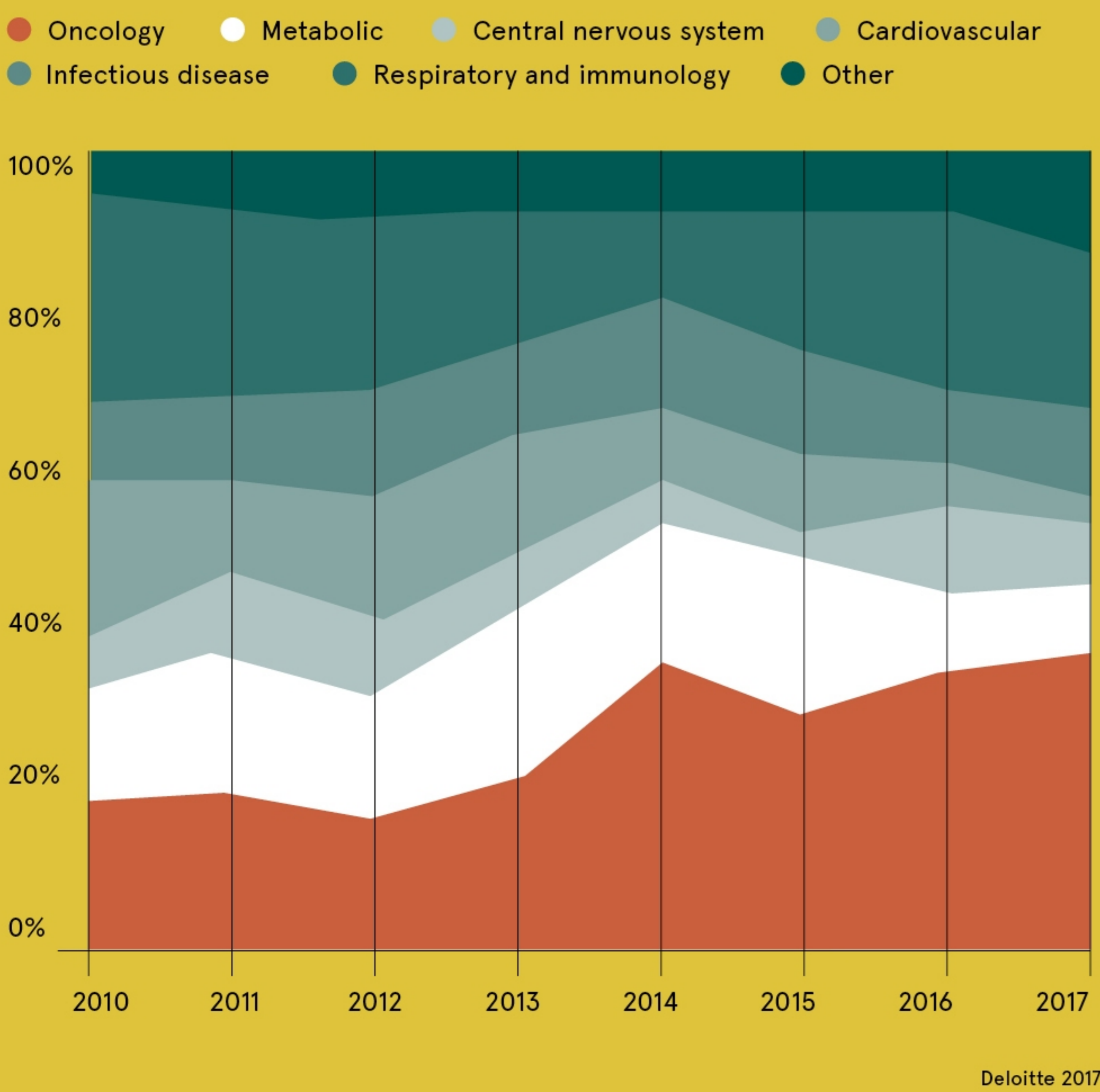
2017 figures sourced from company results; 2024 forecasts are based on a consensus of equity analysts



EvaluatePharma 2018

Changing compositions of pharmaceutical majors

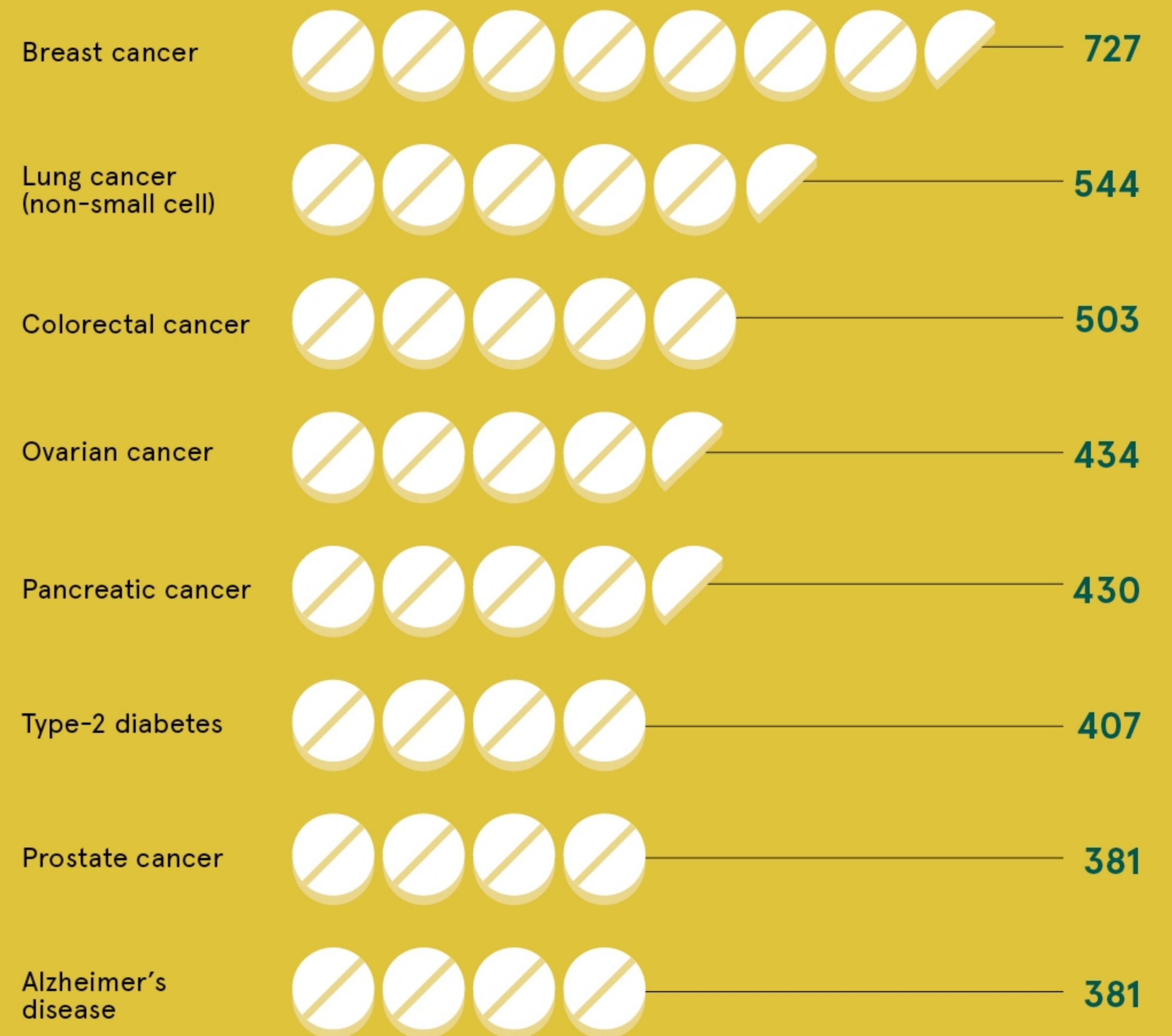
Breakdown by therapy area of 12 large-cap biopharmaceutical companies' late-stage drug pipelines



Deloitte 2017

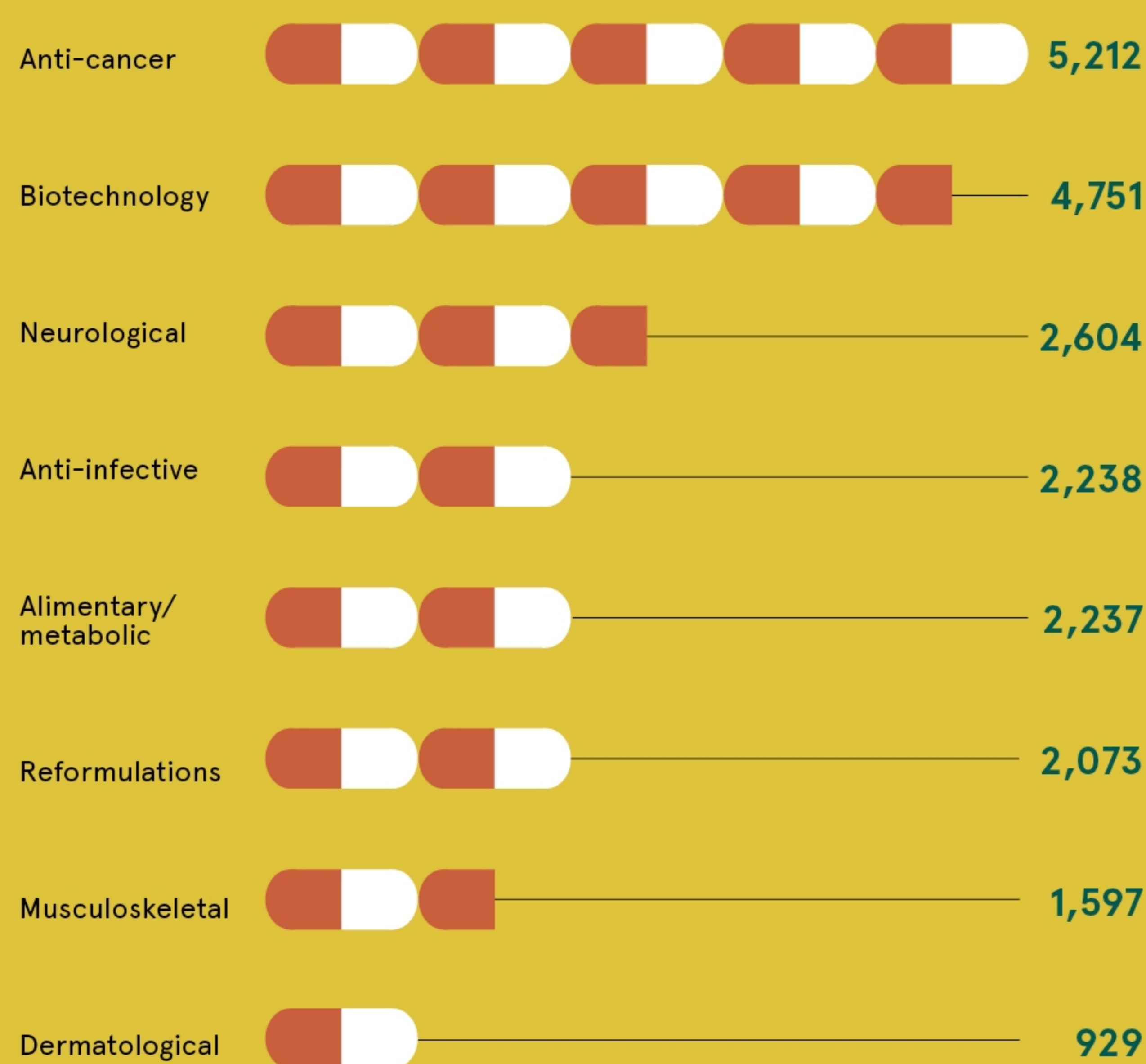
Top drugs by disease or condition

Number of active drugs in 2018



Pharmaprojects 2018

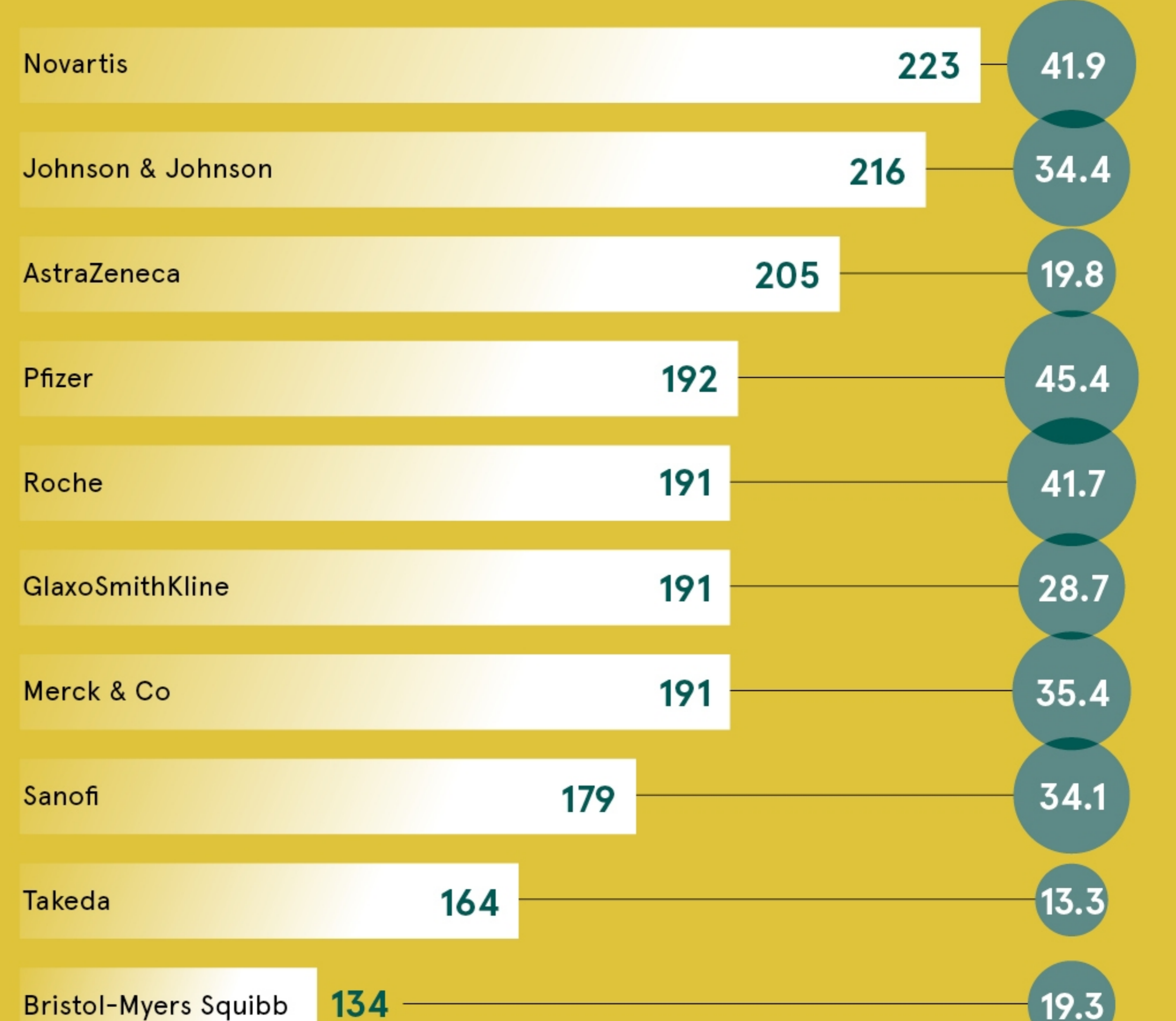
Drug pipeline by therapy area



Pharmaprojects 2018

Biggest pharma companies by pipeline

● Number of drugs in the pipeline in 2018
● Prescription drug sales in 2017 (\$bn)



Pharmaprojects 2018