

# European Drug Forecasts

# European Drug Forecasts to 2024: Real-world, country level historic product sales and consensus based forecasts.

Conduct European market sizing, R&D horizon scanning and price comparison utilising real world government and company reported sales data with country level, consensus based product forecasts to 2024.



## European Market Sizing

Forecasts for key branded products

## Model Future Pipeline Impact

Forecasts for full R&D pipeline

## Government and Company Reported Drug Sales

Compare with audit based systems

## Pricing

Perform comparative pricing analysis

## Generic Market Analysis

Generic sales, volume & pricing

## European Launch Dates

Launch dates for products in European countries

# Single solution for business development and licensing, commercial and corporate strategy, consultants and investment banks



## European Market Sizing

Forecasts for key branded drugs at a European country level – market value of over €100bn in 2024

- Conduct future market assessment
- Map future trends of key marketed drugs
- Profile in line products

## Model Future Pipeline Impact

Full forecast pipeline for R&D products launching in Europe – market value €30bn

- Map key pipeline assets that are likely to launch by 2024 and measure impact
- Identify new medicines and how they impact therapy areas

## Competitive Landscaping

Historical government and company reported sales data (EU 5 and other key markets)

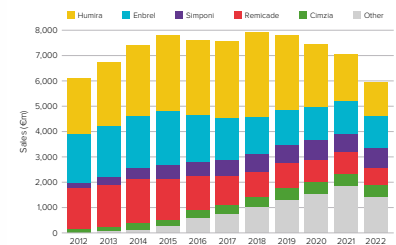
- Compare product performance across key European markets
- Map uptake trends and drivers across European countries
- Understand drug launch timelines across 20 countries

## Pricing Comparison Analysis Across Countries

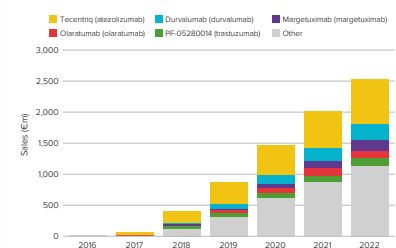
Ex-factory pricing data for Germany, France, Italy, England, Poland, Spain and other key markets

- Perform comparative analysis across EU 6 countries for key products
- Use price/DDD benchmark to inform quick assessment of new assets

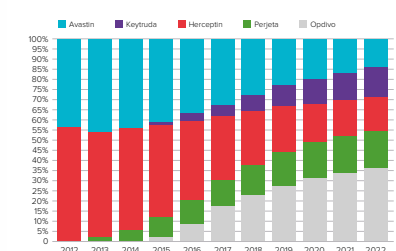
Europe Product Forecasts (€m):  
Top 5 Brands in 2022 Anti-TNF Products



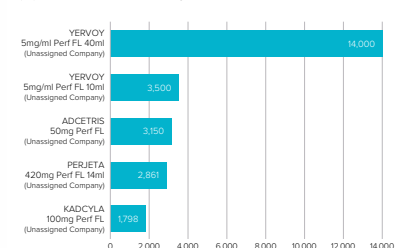
Europe R&D Product Forecasts:  
Monoclonal Antibody Antineoplastics



Sales Market Share within Key Brands:  
Monoclonal Antibody Antineoplastics



Manufacturer Price (France) € - Latest  
(€) Monoclonal Antibody Antineoplastics



## A pioneering methodology for European country level drug forecasts

Powered by Evaluate's industry standard consensus forecasts and broken out on a European country level using:

- European historical data – government and company reported
- Coupled with Evaluate's proprietary methodology inputs:
  - Estimated European launch timelines of R&D products
  - Analogue methodology to model forecast for R&D products
  - European uptake patterns and country launch timings
  - Expected European generic entry



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