European Pharma Market Outlook to 2022

Size of the market in EU-5 set to grow by 25% between 2017-2022 with a CAGR of 4.5% over this period

EU-5 accounts for 69% of European pharma market in 2022

Germany is forecast to have highest increase in market value at €9.7bn

Marketed vs. R&D: Historical and Forecast sales to 2022 (€m)

By 2022, products currently in R&D will account for 13% of sales in Europe

Marketed Products

Xarelto is set to be the biggest selling drug in Europe in 2022

Around 34% of the anti-coagulant product’s sales set to come from Germany

Top selling marketed products in 2022

<table>
<thead>
<tr>
<th>Product</th>
<th>€m</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Xarelto</td>
<td>2,820</td>
</tr>
<tr>
<td>2. Eliquis</td>
<td>2,249</td>
</tr>
<tr>
<td>3. Revlimid</td>
<td>2,195</td>
</tr>
<tr>
<td>4. Imbruvica</td>
<td>1,830</td>
</tr>
<tr>
<td>5. Humira</td>
<td>1,674</td>
</tr>
</tbody>
</table>

R&D Focus

Sanofi’s R&D product Dupixent is forecast to have the highest sales in 2022

Dupixent, currently in Phase III, is set to launch in 2017

Top selling R&D products in 2022

<table>
<thead>
<tr>
<th>Product</th>
<th>€m</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Dupixent</td>
<td>955</td>
</tr>
<tr>
<td>2. Bictegravir/F/TAF</td>
<td>776</td>
</tr>
<tr>
<td>3. Ocrevus</td>
<td>691</td>
</tr>
<tr>
<td>4. Imfinzi</td>
<td>504</td>
</tr>
<tr>
<td>5. Cevira</td>
<td>499</td>
</tr>
</tbody>
</table>

Source: Evaluate European Drug Forecasts, September 2017. Evaluate European Drug Forecasts are based on consensus forecast estimates combined with government and company reported data.

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