

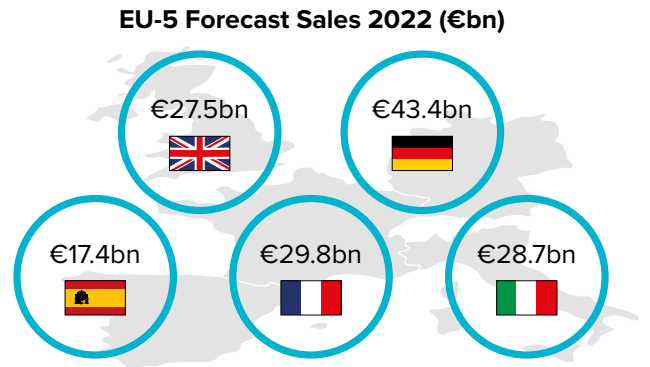


European Pharma Market Outlook to 2022

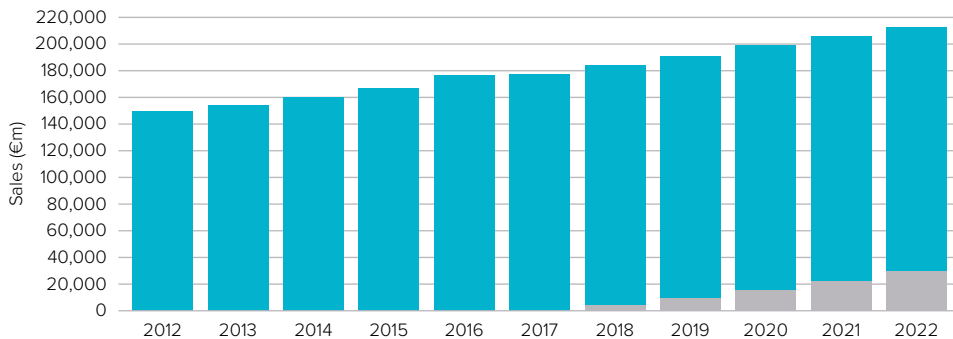
Size of the market in EU set to **grow by 27%** between 2015-2022

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

Germany is forecast to have highest increase in market value at €11.4bn



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



By 2022, products currently in R&D will account for **17%** of sales in Europe

■ Marketed ■ R&D

Marketed Products

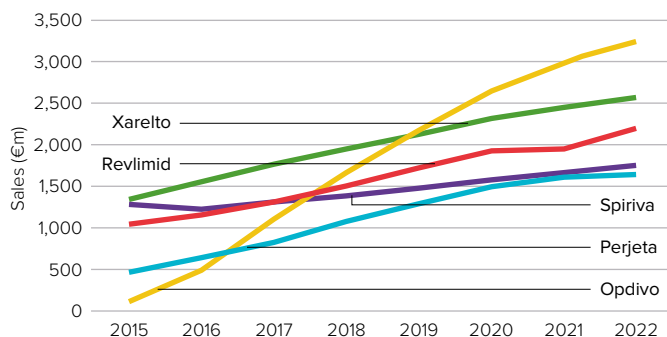
Opdivo is set to be the **biggest selling drug in Europe** in 2022.

Around **41%** of the oncology drug's sales are set to come from Germany.

Top selling marketed products in 2022

Product	€m
1. Opdivo	€3,230
2. Xarelto	€2,532
3. Revlimid	€2,159
4. Spiriva	€1,727
5. Perjeta	€1,618

Key marketed product forecasts to 2022



R&D Focus

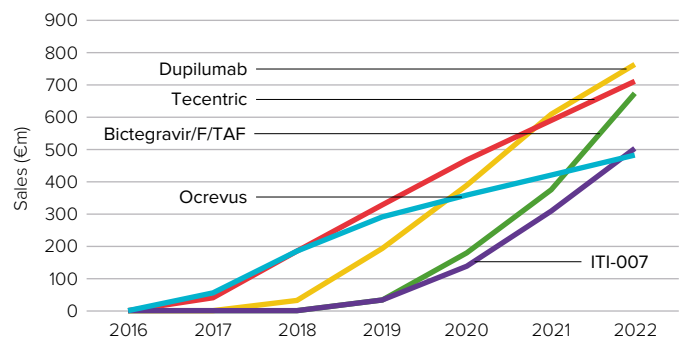
Regeneron's R&D product **Dupilumab** is forecast to have the **highest sales** in 2022.

The product is **set to launch in 2017**.

Top selling R&D products in 2022

Product	€m
1. Dupilumab	€768
2. Tecentriq	€715
3. Bictegravir/F/TAF	€676
4. ITI-007	€505
5. Ocrevus	€485

Key R&D product forecasts to 2022





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