



Biosimilar Analysis

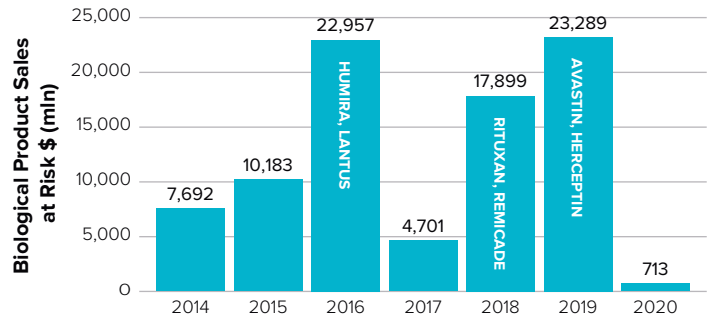
Biological Patent Expiries

Biosimilars are expected to increasingly challenge branded biologicals in coming years

Total of \$87.4 billion of branded biological sales at patent risk from this year to 2020

Eli Lilly's insulin glargine recombinant forecasted to be top selling biosimilar in 2020 at \$631 mln

Sales of Biologicals Going Off Patent



First Approvals

1st USA Biosimilar
2015

Zarxio - Sandoz

Biosimilar filgrastim approved by the FDA on the 6th March 2015



1st EU Biosimilar
2006

Omnitrope - Sandoz

Somatotropin biosimilar approved by the EMA on the 12th of April 2006



1st Japan Biosimilar
2009

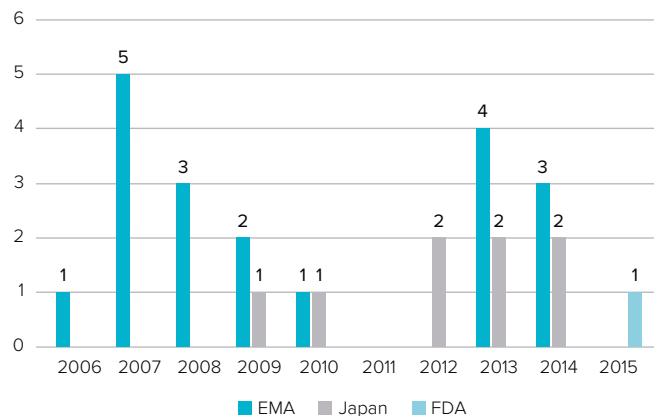
Omnitrope - Sandoz

Somatotropin biosimilar approved by the MHLW on the 22nd of June 2009



Count of Biosimilars Approved in Europe, Japan and USA

Count of EMA, MHLW and FDA approved biosimilars by year



Europe is the market with the most approved biosimilars - **19**

9 separate branded biologicals targeted in Europe.

MHLW in Japan has approved biosimilars of **4** different branded biologicals.

Just one approved biosimilar in the **USA - Zarxio**

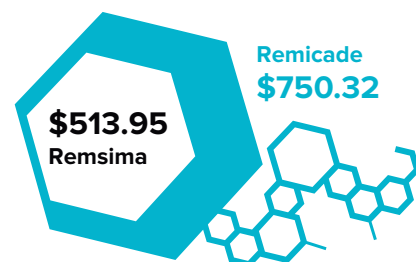
Biosimilars on the market since: **2006** Europe **2009** Japan

Historically, biosimilars targeting biological products have launched in **Europe first**

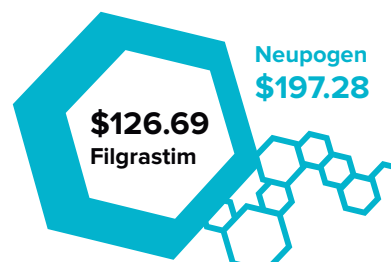
Pricing: Comparing Biosimilars and Branded Products

How Will Biosimilars be Priced Compared to Branded Biologicals?

Case study using reimbursed NHI drug prices



The reimbursement price of Remicade is **\$750.32**, compared to **\$513.95** for the biosimilar Remsima, 100mg I.V. for infusion.



The reimbursement price of Neupogen is **\$197.28**, compared to **\$129.69** for the biosimilar Filgrastim, 300µg syringe.

32%: The price difference between the biological and branded equivalent in Japan for both products



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