

Evaluate Data Kit

Pharma, Biotech and Medtech, May 2018


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Introduction

Welcome to the fourth edition of the Evaluate Data Kit featuring 2024 forecasts for the first time. The kit is designed to help journalists covering the pharma, biotech and medtech sectors.

Often when writing stories it can be hard to put events into context, we are hoping that by providing you with key analyses and consensus forecasts on the industry's biggest products and companies we can make your life easier and add valuable background information to your articles.

In conjunction with our journalist team, EP Vantage, we have curated data that we hope you will find useful, including pharma and medtech company sales, R&D spend and forecasts for the biggest selling drugs in 2024.

When using the data please kindly source us as per the details on page 3.

Please note that our real-world data derived from company, government and other public sources, is updated on a continuous basis. As such, year-on-year comparisons of the kit or reports we have previously published may not yield the same results if the initial source has been updated. For all of our complimentary articles and industry reports from Evaluate or EP Vantage, our award winning editorial team, you may also visit the News and Insights page at www.evaluate.com.

See page 3 for our short descriptions and sourcing protocols as well as our social media handles. Thank you for your interest in Evaluate. Please feel free to contact us with any requests or feedback on the data kit.

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Sourcing Instructions

Evaluate is a leading provider of life science commercial intelligence.
EP Vantage is the independent editorial arm of Evaluate.

To source Evaluate data or reports please use the following formats:

Sourcing Data:

Source: EvaluatePharma®, Month and Year of data, © Evaluate Ltd, www.evaluate.com

Source: EvaluateMedTech®, Month and Year of data, © Evaluate Ltd, www.evaluate.com

Sourcing Reports:

Report Title, © Evaluate Ltd, www.evaluate.com

Note: when sourcing a report, please provide a hyperlink back to the full report on our web site: we can supply you with the URLs.

For Interviews: we can provide expert commentary from both our analyst team and our editorial team.

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Evaluate is the trusted provider of commercial intelligence including product sales and consensus forecasts for commercial teams and their advisors within the global life science industry. We help our clients make high value decisions through superior quality, timely, must-have data and insights, combined with personalised, expert client support. Our online subscription services cover the pharmaceutical, biotech and medtech sectors. Our Custom Services group delivers project-based analytical and data services. EP Vantage, our independent, award-winning editorial team offers data-driven, forward-looking news, commentary and analysis on a daily basis.

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Section 1 – Pharma Industry Overview

Top 15 Companies Ranked on Total Prescription & Over The Counter Pharma Sales

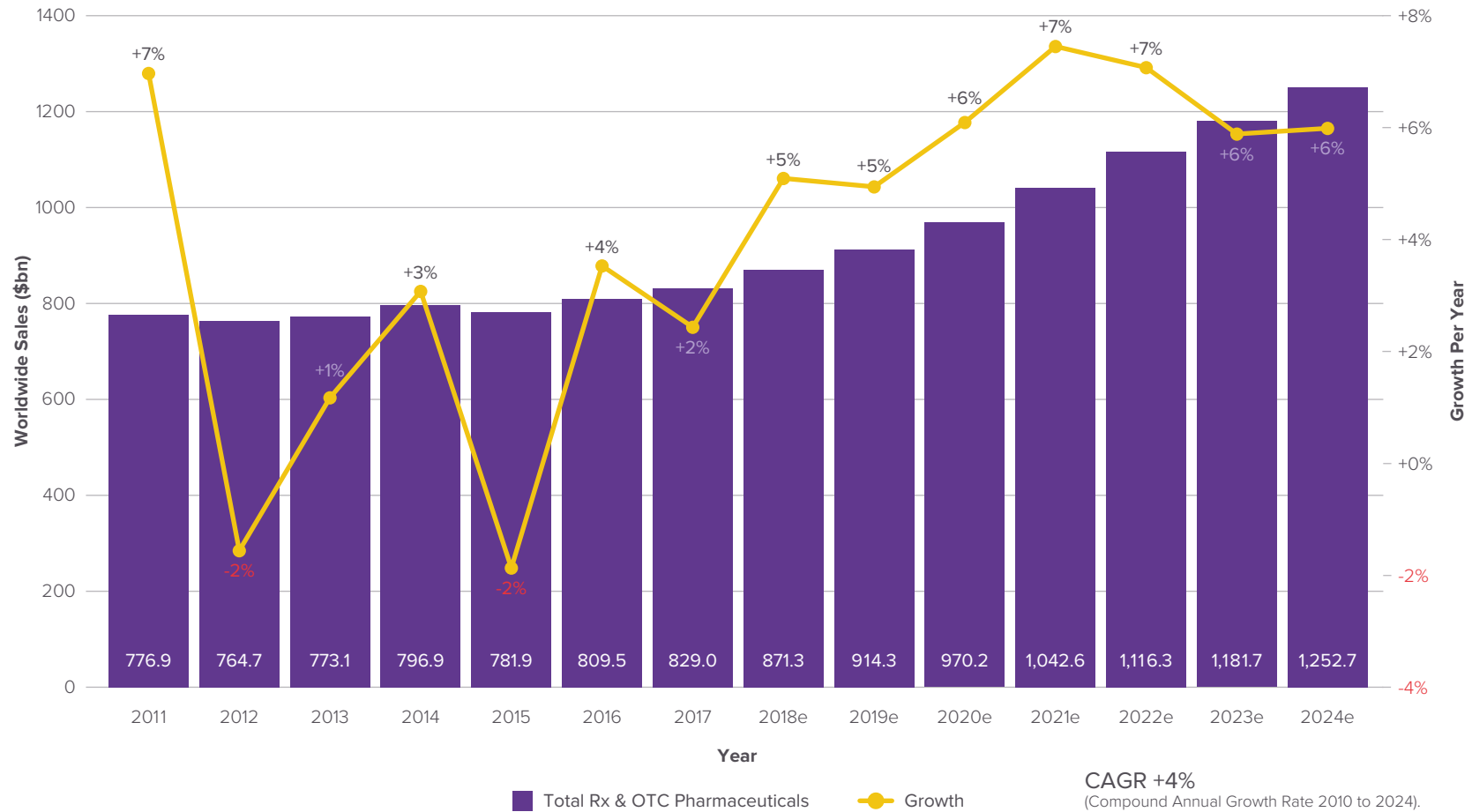
	Total Prescription & OTC Pharma Sales (\$bn)				Market Share			Market Rank		
	2017	2018e	2024e	CAGR	2017	2018e	2024e	2017	2018e	2024e
Pfizer	47.6	47.8	54.0	+2%	5.8%	5.5%	4.3%	1	1	1
Novartis	41.9	44.2	53.2	+3%	5.1%	5.1%	4.3%	2	3	2
Sanofi	39.5	42.5	51.8	+4%	4.8%	4.9%	4.1%	4	4	3
Roche	41.7	45.3	50.6	+3%	5.1%	5.2%	4.1%	3	2	4
Johnson & Johnson	36.8	40.2	50.0	+4%	4.5%	4.6%	4.0%	5	5	5
GlaxoSmithKline	33.8	36.7	45.8	+4%	4.1%	4.2%	3.7%	7	6	6
Merck & Co	35.4	35.2	38.0	+1%	4.3%	4.1%	3.0%	6	7	7
AbbVie	27.7	31.5	37.2	+4%	3.4%	3.6%	3.0%	8	8	8
AstraZeneca	19.8	21.0	31.7	+7%	2.4%	2.4%	2.5%	12	11	9
Bristol-Myers Squibb	19.3	20.7	28.7	+6%	2.3%	2.4%	2.3%	14	13	10
Bayer	22.7	24.9	25.6	+2%	2.7%	2.9%	2.0%	10	9	11
Amgen	21.8	21.9	24.8	+2%	2.6%	2.5%	2.0%	11	10	12
Novo Nordisk	17.0	18.3	24.6	+5%	2.1%	2.1%	2.0%	16	15	13
Celgene	12.9	14.7	23.7	+9%	1.6%	1.7%	1.9%	21	20	14
Eli Lilly	18.5	18.6	22.2	+3%	2.2%	2.1%	1.8%	15	14	15
Sum	436.5	463.5	562.0	+4%	52.9%	53.4%	45.0%	-	-	-
Rest of Market	388.4	404.6	687.4	+8%	47.1%	46.6%	55.0%	-	-	-
Total Market	824.9	868.1	1,249.4	+6%	100.0%	100.0%	100.0%	-	-	-

CAGR (Compound Annual Growth Rate 2017 to 2024).

Source: EvaluatePharma® (May 2018) | www.evaluate.com



Worldwide Total Prescription & Over The Counter Pharma Sales



Source: EvaluatePharma® (May 2018) | www.evaluate.com



Top 15 Companies Ranked on 2024 R&D Spend

	Pharma R&D Spend (\$bn)			Growth per Year (%)			Market Rank		
	2017	2018e	2024e	2018e	2024e	CAGR	2017	2018e	2024e
Roche	9.2	10.2	11.7	+11.1%	+1.7%	+3.5%	1	1	1
Johnson & Johnson	8.4	8.5	10.0	+1.9%	+2.5%	+2.5%	2	2	2
Novartis	7.8	8.1	9.0	+3.7%	+1.9%	+2.1%	3	3	3
Merck & Co	7.6	7.8	8.3	+3.8%	+0.2%	+1.3%	5	4	4
Sanofi	6.2	6.9	8.2	+11.2%	+2.5%	+4.1%	6	6	5
Pfizer	7.6	7.6	8.0	-0.5%	+1.2%	+0.7%	4	5	6
GlaxoSmithKline	5.0	5.3	6.2	+5.5%	+2.4%	+3.2%	8	8	7
AstraZeneca	5.4	5.3	6.1	-2.1%	+2.1%	+1.7%	7	7	8
AbbVie	4.8	5.2	5.9	+8.0%	-0.3%	+3.0%	10	10	9
Bristol-Myers Squibb	4.8	5.2	5.7	+8.2%	+0.6%	+2.5%	11	9	10
Eli Lilly	5.0	4.8	5.4	-3.3%	+2.6%	+1.2%	9	11	11
Celgene	3.0	3.1	4.5	+2.4%	+2.2%	+5.8%	15	15	12
Amgen	3.5	3.6	4.1	+2.9%	+2.4%	+2.3%	12	12	13
Boehringer Ingelheim	3.1	3.4	4.1	+12.1%	-1.5%	+4.1%	14	13	14
Bayer	3.3	3.4	4.0	+4.1%	+1.2%	+2.8%	13	14	15
Total Market	185.6	193.0	225.2	+4.0%	+2.3%	+2.8%	-	-	-

CAGR (Compound Annual Growth Rate 2017 to 2024).

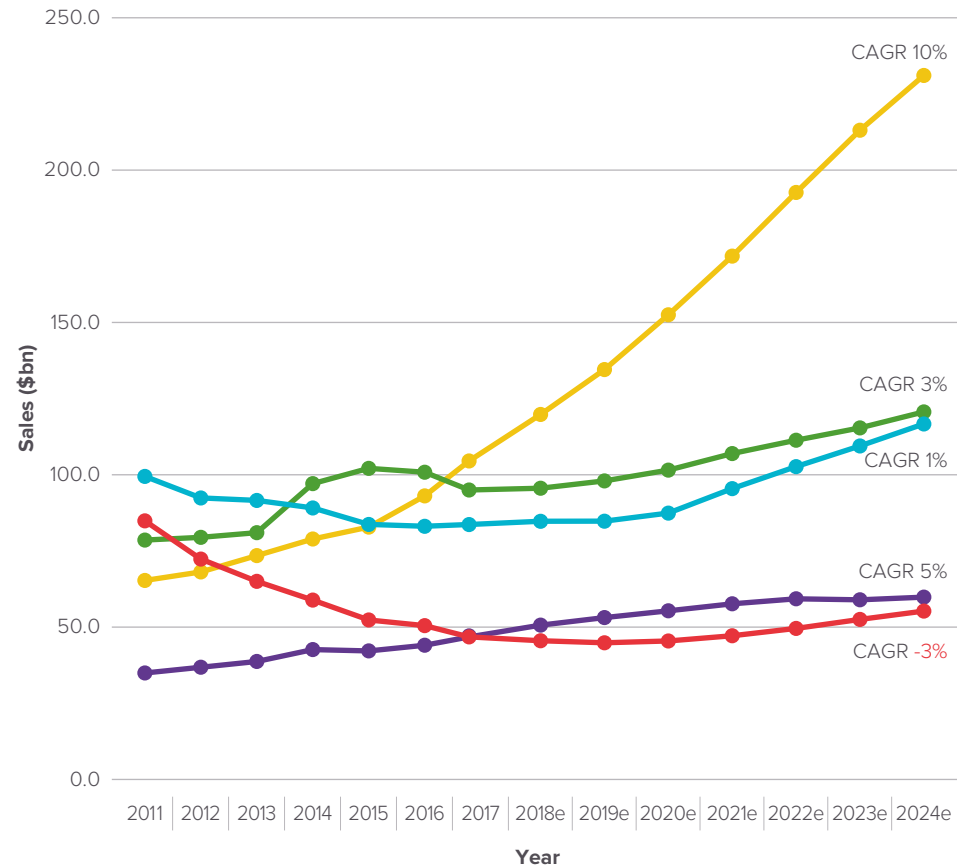
Historic: Reported Pharmaceutical R&D (Rx & OTC) products. Excludes exceptional R&D expenses, if disclosed separately.

Forecast: EvaluatePharma forecasts Pharma R&D based on a brokers' consensus of total company R&D.

Source: EvaluatePharma® (May 2018) | www.evaluate.com



Worldwide Total Prescription & Over The Counter Pharma Sales by Therapy Area



Year	Oncology*	Systemic anti-Infectives	Central nervous system	Anti-diabetics	Cardio-vascular
2011	64.7	78.2	99.1	34.9	84.3
2012	67.7	79.0	92.0	36.6	71.9
2013	73.0	80.8	91.5	38.4	64.6
2014	78.7	97.0	88.4	42.2	58.6
2015	82.9	102.4	83.8	41.9	51.6
2016	93.2	100.2	82.9	43.6	50.0
2017	104.0	94.9	83.2	46.1	46.5
2018e	119.3	95.1	84.5	49.9	45.2
2019e	134.2	97.8	84.6	52.6	44.6
2020e	151.4	101.4	87.2	55.2	45.4
2021e	171.2	106.7	95.1	57.9	47.0
2022e	191.9	111.0	102.6	58.9	49.3
2023e	211.9	115.1	109.1	58.5	52.2
2024e	230.6	120.5	116.5	59.4	55.3

*Excludes immunomodulators.

CAGR (Compound Annual Growth Rate 2010 to 2024).

Source: EvaluatePharma® (May 2018) | www.evaluate.com



Top 15 Drugs Ranked on 2024 Worldwide Sales

Product	Company	Annual Sales WW (\$m)		Total Change (\$m)	CAGR
		2017	2024e		
Humira	AbbVie + Eisai	18,922	15,233	-3,689	-3%
Keytruda	Merck & Co + Otsuka Holdings	3,823	12,686	+8,862	+19%
Revlimid	Celgene + BeiGene	8,191	11,931	+3,741	+6%
Opdivo	Bristol-Myers Squibb + Ono Pharmaceutical	5,725	11,247	+5,522	+10%
Eliquis	Bristol-Myers Squibb	4,872	10,535	+5,663	+12%
Imbruvica	AbbVie + Johnson & Johnson	3,196	9,557	+6,361	+17%
Ibrance	Pfizer	3,126	8,284	+5,158	+15%
Dupixent	Sanofi	247	8,058	+7,811	+64%
Eylea	Regeneron Pharmaceuticals + Bayer + Santen Pharmaceutical	6,282	6,827	+545	+1%
Stelara	Johnson & Johnson	4,011	6,466	+2,455	+7%
Biktarvy	Gilead Sciences	-	6,103	+6,103	n/a
Darzalex	Johnson & Johnson	1,242	6,033	+4,791	+25%
Tecentriq	Roche	495	6,006	+5,511	+43%
Prolia/Xgeva	Amgen + Daiichi Sankyo	3,891	5,995	+2,104	+6%
Perjeta	Roche	2,231	5,935	+3,704	+15%

CAGR (Compound Annual Growth Rate 2017 to 2024).

Source: EvaluatePharma® (May 2018) | www.evaluate.com



Section 2 – Medtech Industry Overview

Top 15 Companies Ranked on Total MedTech Sales

	Total MedTech Sales (\$bn)			CAGR	Market Share			Market Rank		
	2017	2018e	2024e		2017	2018e	2024e	2017	2018e	2024e
Medtronic*	29.8	31.0	39.8	+4%	7.3%	7.0%	6.6%	1	1	1
Johnson & Johnson	26.6	27.4	33.1	+3%	6.5%	6.2%	5.5%	2	2	2
Abbott Laboratories*	16.0	18.8	26.2	+7%	3.9%	4.3%	4.3%	3	3	3
Siemens	15.3	17.0	21.2	+5%	3.8%	3.8%	3.5%	4	4	4
Philips	13.6	15.6	20.1	+6%	3.3%	3.5%	3.3%	5	5	5
Becton Dickinson	11.0	13.6	19.1	+8%	2.7%	3.1%	3.2%	8	6	6
Stryker	12.4	13.2	17.9	+5%	3.1%	3.0%	3.0%	6	8	7
Roche	12.3	13.6	17.6	+5%	3.0%	3.1%	2.9%	7	7	8
Boston Scientific	9.0	9.7	13.7	+6%	2.2%	2.2%	2.3%	10	10	9
General Electric	10.2	10.6	12.7	+3%	2.5%	2.4%	2.1%	9	9	10
Essilor International*	7.3	8.5	12.0	+7%	1.8%	1.9%	2.0%	14	13	11
B. Braun Melsungen*	7.7	8.8	12.0	+7%	1.9%	2.0%	2.0%	13	12	12
Danaher	8.7	9.1	11.2	+4%	2.1%	2.1%	1.9%	11	11	13
Baxter International*	7.3	7.9	10.4	+5%	1.8%	1.8%	1.7%	15	15	14
Zimmer Biomet	7.8	8.0	9.4	+3%	1.9%	1.8%	1.5%	12	14	15
Rest of Market	211.6	228.0	327.9	+6%	52.0%	51.7%	54.3%	-	-	-
Total Market	406.6	440.8	604.3	+6%	100.0%	100.0%	100.0%	-	-	-

CAGR (Compound Annual Growth Rate 2017 to 2024).

*2017 numbers are forecasts.

Source: EvaluateMedTech® (May 2018) | www.evaluate.com



Top 15 Device Areas Ranked on WW Sales

	WW Sales (\$bn)			CAGR	WW Market Share			Market Rank		
	2017	2018e	2024e		2017	2018e	2024e	2017	2018e	2024e
In Vitro Diagnostics (IVD)	51.8	55.8	78.5	+6%	12.7%	12.6%	13.0%	1	1	1
Cardiology	46.7	50.8	71.6	+6%	11.5%	11.5%	11.8%	2	2	2
Diagnostic Imaging	39.8	43.7	54.4	+5%	9.8%	9.9%	9.0%	3	3	3
Orthopedics	36.2	37.9	47.8	+4%	8.9%	8.6%	7.9%	4	4	4
Ophthalmics	27.7	30.6	43.1	+6%	6.8%	6.9%	7.1%	5	5	5
General & Plastic Surgery	20.7	22.5	30.5	+6%	5.1%	5.1%	5.1%	6	6	6
Endoscopy	19.1	21.0	30.3	+7%	4.7%	4.8%	5.0%	7	7	7
Drug Delivery	18.5	19.0	25.9	+5%	4.5%	4.3%	4.3%	8	8	8
Dental	14.0	15.3	21.8	+7%	3.4%	3.5%	3.6%	9	9	9
Diabetic Care	11.8	12.8	19.2	+7%	2.9%	2.9%	3.2%	12	12	10
Wound Management	13.5	14.3	18.9	+5%	3.3%	3.3%	3.1%	10	10	11
Healthcare IT	11.8	13.2	18.6	+7%	2.9%	3.0%	3.1%	11	11	12
Nephrology	11.6	12.0	16.1	+5%	2.9%	2.7%	2.7%	13	13	13
Neurology	8.6	9.4	15.4	+9%	2.1%	2.1%	2.5%	16	16	14
Ear, Nose & Throat (ENT)	9.0	10.0	14.0	+7%	2.2%	2.3%	2.3%	15	15	15
Top 15	340.7	368.4	506.1	+6%	83.8%	83.6%	83.7%	-	-	-
Other MedTech	65.9	72.5	98.2	+6%	16.2%	16.4%	16.3%	-	-	-
Total MedTech Sales	406.6	440.8	604.3	+6%	100.0%	100.0%	100.0%	-	-	-

CAGR (Compound Annual Growth Rate 2017 to 2024).

Source: EvaluateMedTech® (May 2018) | www.evaluate.com



Top 15 Companies Ranked on 2024 R&D Spend

	R&D Spend (\$bn)			Growth		CAGR	Market Rank		
	2017	2018e	2024e	2018e	2024e		2017	2018e	2024e
Medtronic*	2.2	2.3	2.7	+2.3%	+2.5%	+2.5%	1	1	1
Abbott Laboratories*	1.7	1.9	2.4	+16.0%	+3.4%	+5.6%	3	2	2
Philips	1.7	1.9	2.3	+9.3%	+3.3%	+4.1%	2	3	3
Siemens	1.4	1.6	2.0	+10.8%	+3.6%	+5.0%	5	5	4
Johnson & Johnson	1.6	1.6	1.9	+1.9%	+2.5%	+2.5%	4	4	5
Roche	1.4	1.4	1.6	-0.9%	+1.7%	+1.8%	6	6	6
Becton Dickinson	0.8	1.0	1.4	+31.7%	+4.1%	+8.8%	11	9	7
Boston Scientific	1.0	1.0	1.3	+6.1%	+3.8%	+4.5%	8	7	8
Danaher	0.9	1.0	1.3	+8.5%	+3.8%	+4.7%	9	8	9
Stryker	0.8	0.8	1.1	+5.5%	+4.0%	+4.6%	10	11	10
General Electric	1.0	1.0	1.1	+1.4%	+0.9%	+1.0%	7	10	11
Edwards Lifesciences*	0.6	0.6	0.9	+13.7%	+5.4%	+7.5%	13	13	12
Baxter International*	0.6	0.6	0.8	+1.9%	+3.6%	+3.3%	12	12	13
3M	0.5	0.5	0.6	+5.7%	+3.8%	+4.5%	15	15	14
Novartis	0.5	0.5	0.6	+3.7%	+1.9%	+2.1%	14	14	15
Rest of Market	11.9	12.6	17.3	+6.3%	+4.9%	+5.5%	-	-	-
Total Market	28.5	30.5	39.2	+6.9%	+3.9%	+4.6%	-	-	-

CAGR (Compound Annual Growth Rate 2017 to 2024).

*2017 numbers are forecasts.

Source: EvaluateMedTech® (May 2018) | www.evaluate.com

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