

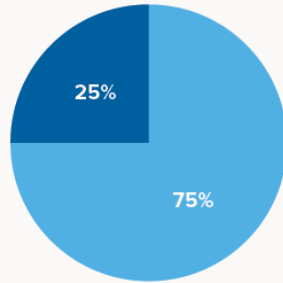
January 2017

Lifetime Trends in Biopharmaceutical Innovation

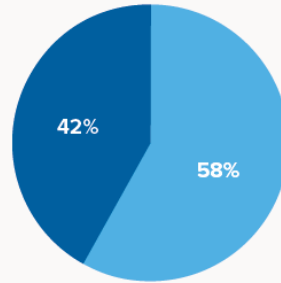
Recent Evidence and Implications



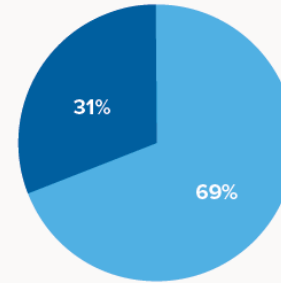
Characterization of all NASs Launched 1996–2015



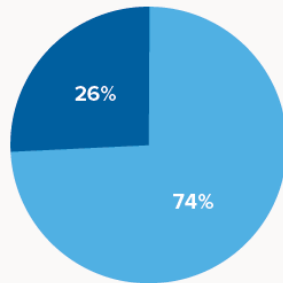
■ Biologic ■ Non-Biologic



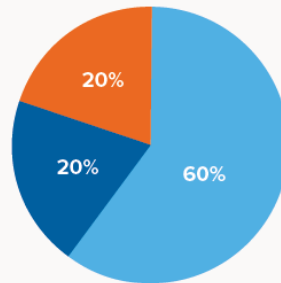
■ Primary Care Driven ■ Specialist Driven



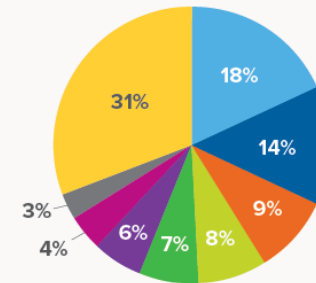
■ Orphan ■ Not Orphan



■ Same Patenting & Launching Company
 ■ Different Patenting & Launching Company



■ Large Pharma ■ Mid Pharma
 ■ Small Pharma



■ Oncology ■ Communicable Disease
 ■ CNS / Mental Health ■ Alimentary
 ■ Blood ■ Cardiovascular
 ■ Immunology
 ■ Diabetes ■ All Others

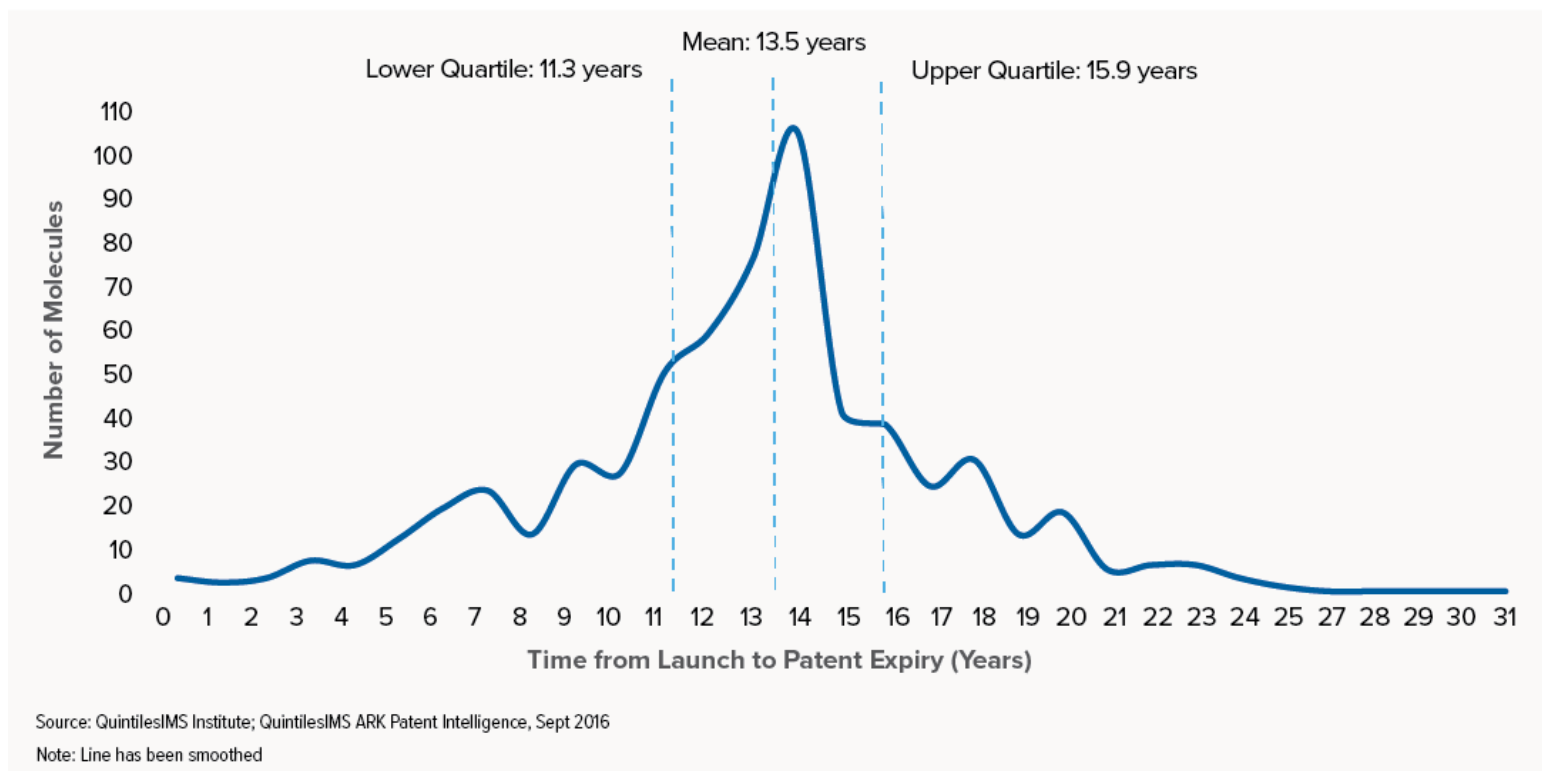
Source: QuintilesIMS Institute, Sept 2016

Notes: CNS denotes central nervous system disorders; Primary care and specialist-driven designations refer to the type of physician who initiates or treats using medicines in a given therapy class.

Time from Patent Filing to Launch for NASs 1996–2015



Time from Launch to Patent Expiry for NASs 1996–2015



Share of U.S. NASs by Average Annual Sales in the First Five Years

