

PREDICTIONS AND AREAS TO WATCH

in the global pharma market ahead, 2019-2023

GLOBAL PREDICTIONS

Slower global market growth versus the recent five-year average



UNITED STATES 2023: +4-7% 5-year CAGR

2018: +7.2% 5-year CAGR

WORLDWIDE 2018: +6.3% 5-year CAGR **2023: +3-6%** 5-year CAGR

products and pricing shifts will be moderated in the U.S. and by cost-containment

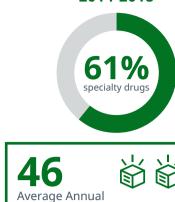
Growth from new

by **loss of exclusivity** measures worldwide.

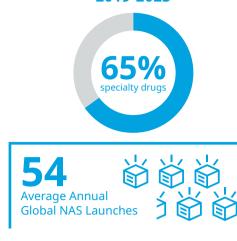
2014-2018 2019-2023 Success rates will reach a

R&D pipelines expand, and continued rates of success drive more launches

historic high, yielding an average of **54 new** launches per year over the next five years. Research continues to skew towards specialty, orphan and oncology products, with nearly two thirds of launches being specialty drugs.



Global NAS Launches



The impact in developed markets is

The expected impact of losses of exclusivity will peak in 2019

between 2019 and 2023, with the U.S. accounting for \$95 billion. By the end of 2023, only two of the current top 20 original brands

expected to be \$121 billion

will not be facing generic or biosimilar competition.



Spending is expected to decline by -3 to 0% through 2023 largely

due to exchange rate effects and an uptake in the use of generics.













Cost-containment measures and less

growth from new products in Europe

contribute to slower growth of 1-4%,

compared to the 4.7% compound annual growth seen over the past five years that

2018: +4.7% 5-year CAGR 2023: +1-4% 5-year CAGR

TOP 5 EUROPE



was significantly lifted by spending from new products.

prescription digital therapeutics (DTx) are are an emerging treatment modality with indications and disease-specific treatment effectiveness claims in their prescribing labels.

Prescription digital therapeutics bring new players and new investments

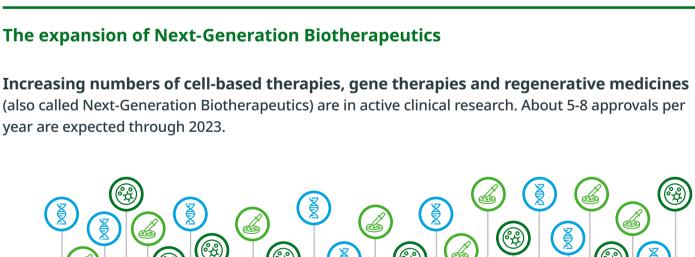
Mobile apps are increasingly submitted to the FDA for clearance or approval. These



The expansion of Next-Generation Biotherapeutics year are expected through 2023.

privacy, and the proper use and management of ever more

extensive and complex data sets.



Declining role of prescription opioids in the opioid epidemic



the next five years will be brought to market by emerging biopharma companies.

Growing influence of emerging biopharma companies

More than one-third of drugs launched in



Expanding use of real-world evidence (RWE) in clinical trials

Standards and practices will continue to evolve for the use of RWE in clinical trials, post-approval marketing and supportive studies to characterize and understand diseases.









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Existing policies and new legislation in the U.S. will likely impact opioid prescribing and use through 2023, while the dynamics around prescription