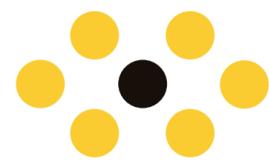
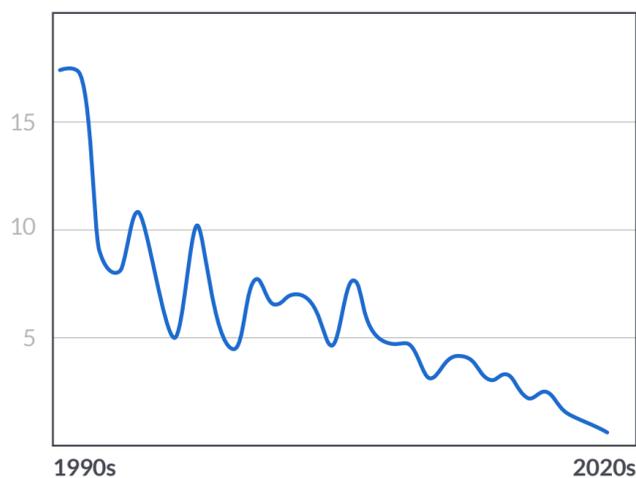


Key Trends Shaping the Pharma Industry Over the Next 5 Years



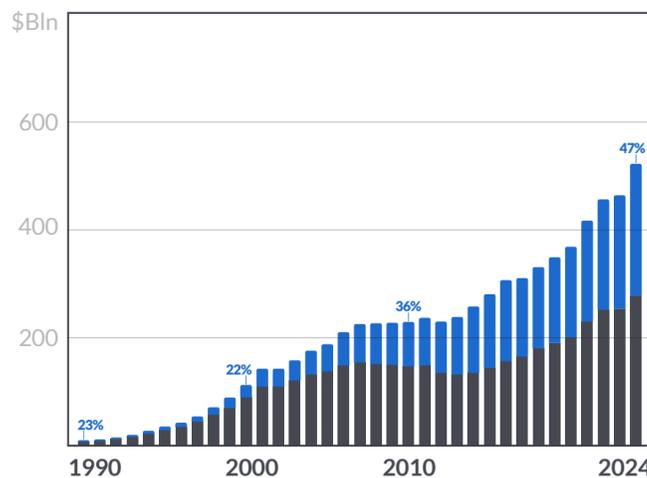
Pharmaceutical companies are struggling to achieve profits and keep up with the innovation speed



8 years

Drop in time span between approval of the first and second new molecular entities over the last 20 years, resulting in the decline of leader's average market share from 90% to 70%.

Source: BCG

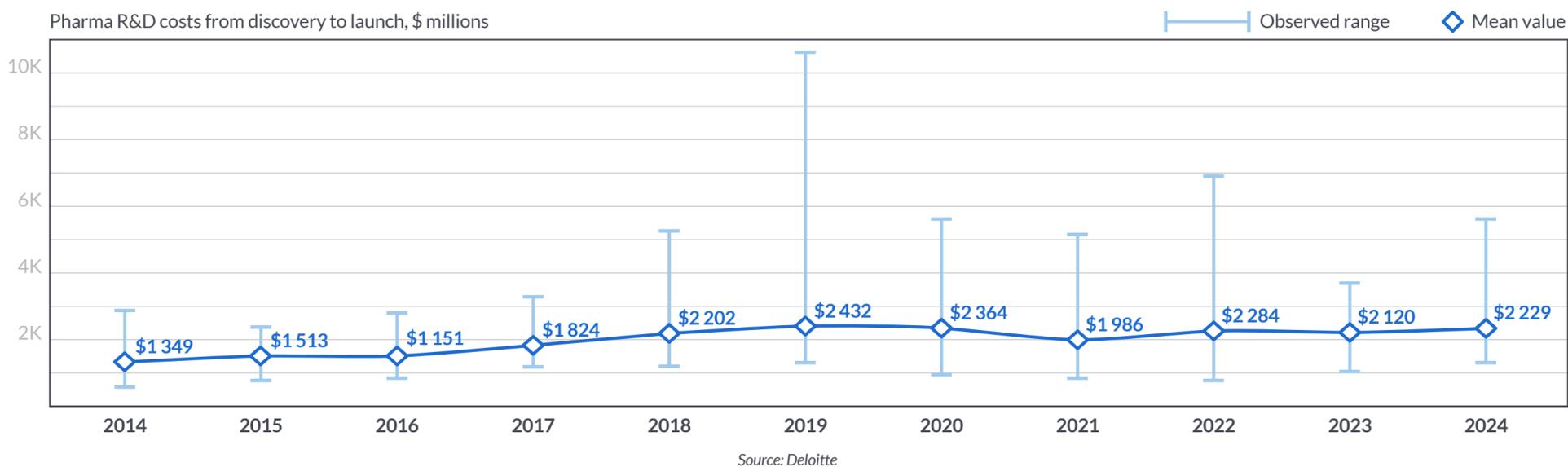


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Market share of first-in-class products doubled in the past 20 years, reaching 50%. By 2030, 15% of the market will consist of emerging drug modalities vs. 5% in 2020.

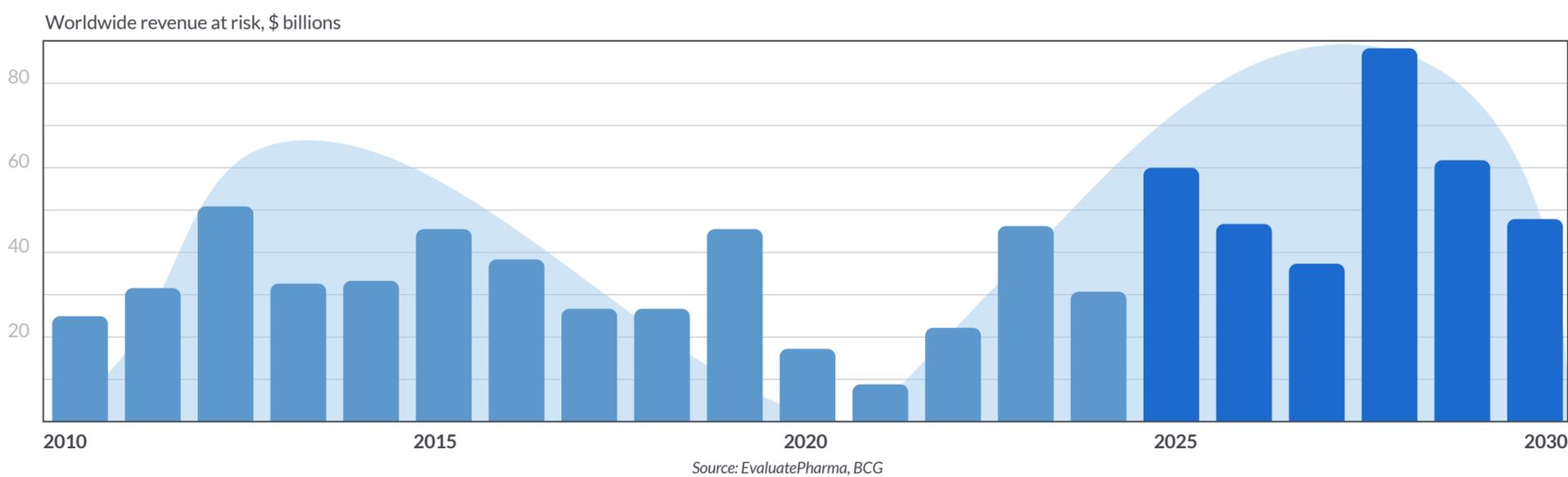
Source: EvaluatePharma, BCG

Drug development costs observe an upward trend with average cost exceeding \$2.2 billion per asset



Source: Deloitte

Pharma market is fast approaching the next patent cliff as \$360 billion revenue drugs lose their exclusivity from 2025 through 2030



Source: EvaluatePharma, BCG

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