

Biosimilars: Cost Effective Alternatives

Biologics

Substances (complex molecules) derived from living organisms - human, animal or microorganism - to treat diseases and medical conditions.

Biosimilars

Biotherapeutic products which are similar in terms of quality, safety and efficacy to an already licensed reference biologic product.

Market potential for Pharma



7 out of top ten best selling medicines were Biologics in 2015

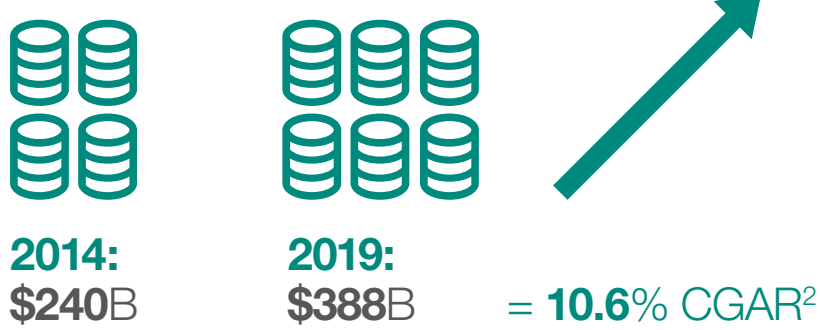
\$108B

Potential savings over first decade of availability of Biosimilars in the US

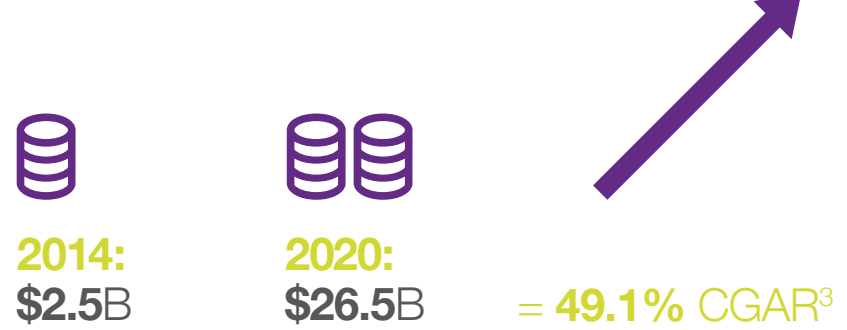
20%

Biologics will account for 20% of total worldwide pharmaceutical spending by 2017¹

Forecast global sales of Biologics:

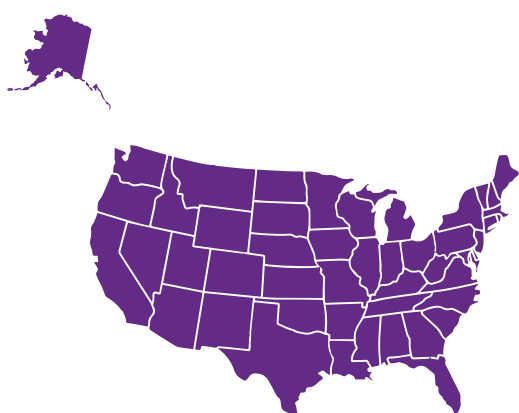


Forecast global sales of Biosimilars:



The patents of top 13 Biologics in the US are due to expire by 2020

Regional Differences



49%

US accounts for the highest percentage of global Biologics market value. 2 biosimilars are approved



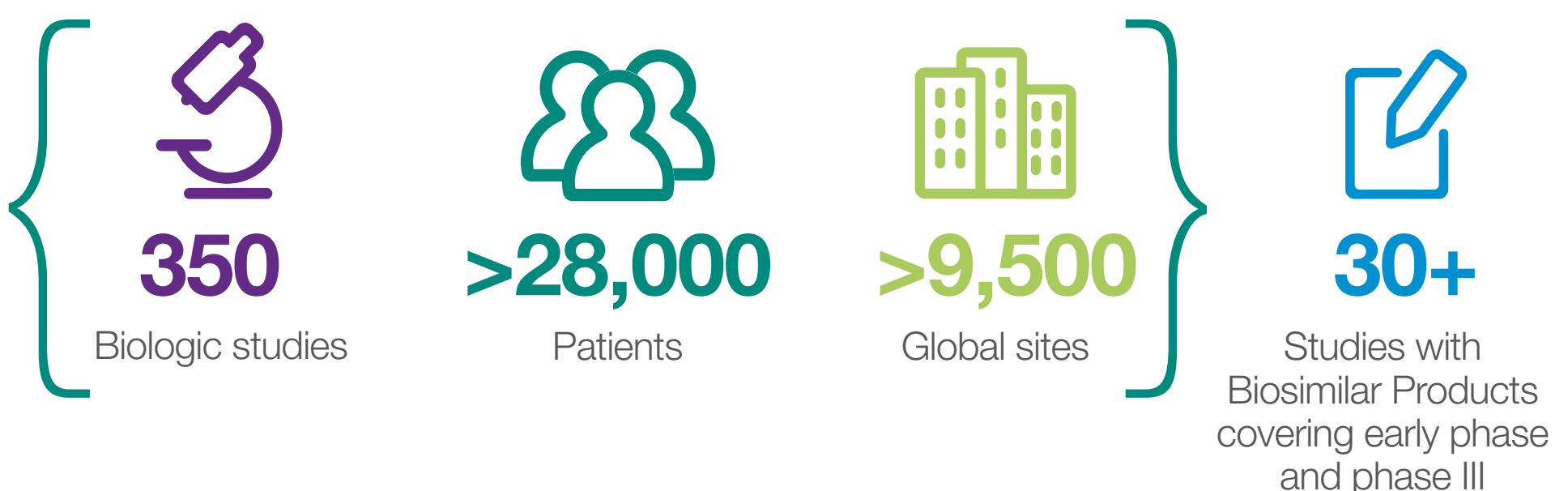
20

Biosimilars already approved in the EU



APAC is leading the way in Biosimilar Development

ICON Biologics and Biosimilar Experience



Sources: 1: IMS Health; 2: BCC Research Jan 2015; 3: Allied Market Research Sept 2015