

ORPHAN DRUGS: READY TO PEAK?

Orphan drugs continue to march ahead - but for how much longer?



2018



2028

WHAT'S AN ORPHAN DRUG?

Orphan drugs are treatments for diseases that affect fewer than 200,000 people in the US or fewer than 5 in 10,000 people in Europe.

**A
DECADE
OF OUTPACING
THE MARKET
WILL
CONTINUE
...FOR NOW.**

ORPHANS
\$300BN

OVERALL MARKET
\$1.5 TN

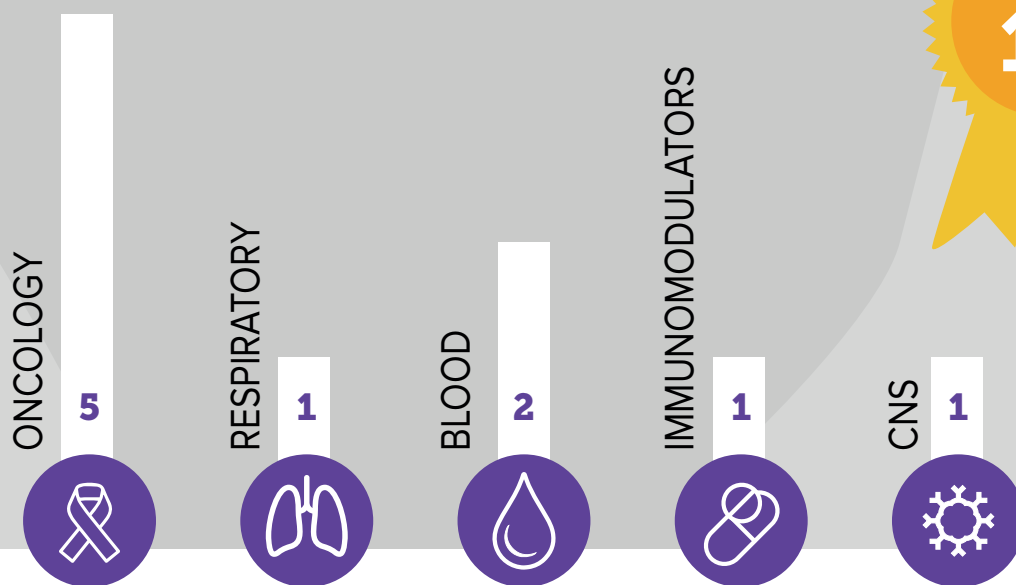
ONE FIFTH
ALL NON-GENERIC
DRUG SALES

ORPHANS' GROWTH
11.6% CAGR

OVERALL MARKET GROWTH
7% CAGR
*excludes generics

TOP 10 ORPHANS BY THERAPY AREA

ONCOLOGY CONTINUES TO DOMINATE



PLAYERS

Johnson & Johnson
\$26.6 BN

AstraZeneca 
\$21.1 BN


\$15.8 BN



ORPHANS

 **DARZALEX**
\$14.5 BN
 (Johnson & Johnson)

 **trikafta**[®]
\$10.5 BN
 (Vertex Pharmaceuticals)-

 **HEMLIBRA**[®]
\$6.2 BN
 (Roche & Chugai Pharmaceuticals)

