IQVIA Switzerland
Presentation Year-End Data 2020

Client Webinar - February 11th 2021

Our panel today

Nicola Hall
Senior Vice President and General Manager, IQVIA Switzerland

Gregor Pfister
Associate Director Supplier Relations & Offering Management, IQVIA Switzerland

Markus Matuschke
Manager Offering Development & Marketing, IQVIA Switzerland

Stephanie Burri
Manager Supplier Services, IQVIA Switzerland

Agenda

How the Corona Pandemic impacted the Consumer Health Market in 2020

Gregor Pfister, Supplier Relations & Offering Management, IQVIA Switzerland

Markus Matuschke, Manager Offering Development & Marketing, IQVIA Switzerland

Pharmamarket Switzerland 2020 and the Influence of the Corona Pandemic

Stephanie Burri, Manager Supplier Services, IQVIA Switzerland

Q&A Session

How the Corona Pandemic impacted the Consumer Health Market in 2020

Client Webinar - February 11th 2021

Gregor Pfister, Markus Matuschke
Supplier Relations & Offering Management

How the Corona Pandemic impacted the Consumer Health Market in 2020

+ Market Overview and Consumer Behavior
+ Consumer Health Market Deep Dive and the Impact of COVID-19
+ Outlook for 2021 with two possible scenarios

Overall strong growth of +3.5% bringing consumer health market value up to almost CHF 2.6 billion

Pack volume increases by +1.3% with biggest plus in patient care segment

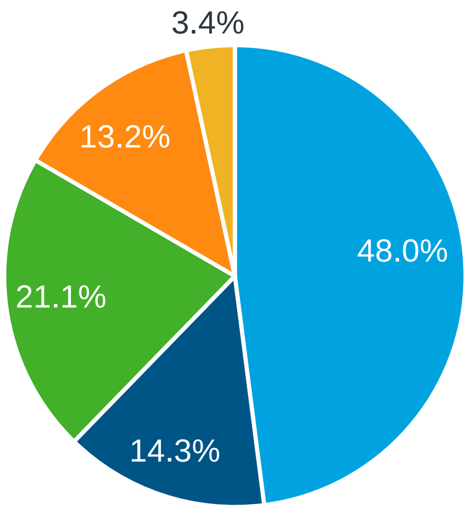
MAT Dec 20

Streetprice value in CHF
2’584.7 M (+87.2 M / +3.5%)

Nutrition
87.7 M
(+3.4 m / +4.0%)

Patient Care
342.1 M
(+37.4 M /+12.3%)

Personal Care
545.0 M
(-21.2 M / -3.7%)



OTC IQVIA
1’610.0 M
(+67.6 M / +4.4%)

OTC IQVIA
not SL
1’239.9 M
(+56.3 M / +4.8%)

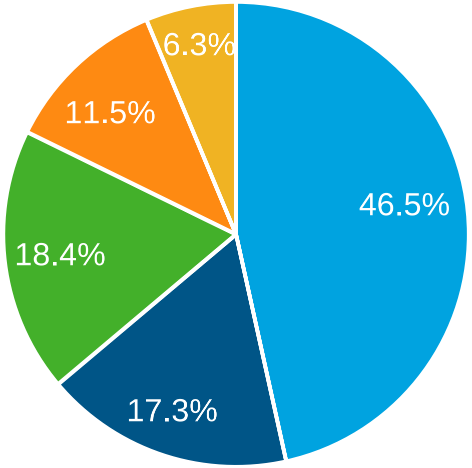
OTC IQVIA SL
370.0 M
(+11.3 M / +3.2%)

Volume in packs
143.5 M (+1.9 M / +1.3%)

Nutrition
9.0 M
(+0.1 M / +1.0%)

Patient Care
16.4 M
(+1.5 M / +10.1%)

Personal Care
26.4 M
(-0.9 M / -3.4%)



OTC IQVIA
91.6 M
(+1.2 M / +1.3%)

OTC IQVIA
not SL
66.8 M
(+0.5 M / +0.8%)

OTC IQVIA SL
24.8 M
(+0.7 M / +3.0%)

Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

IQVIA CONSUMER HEALTH

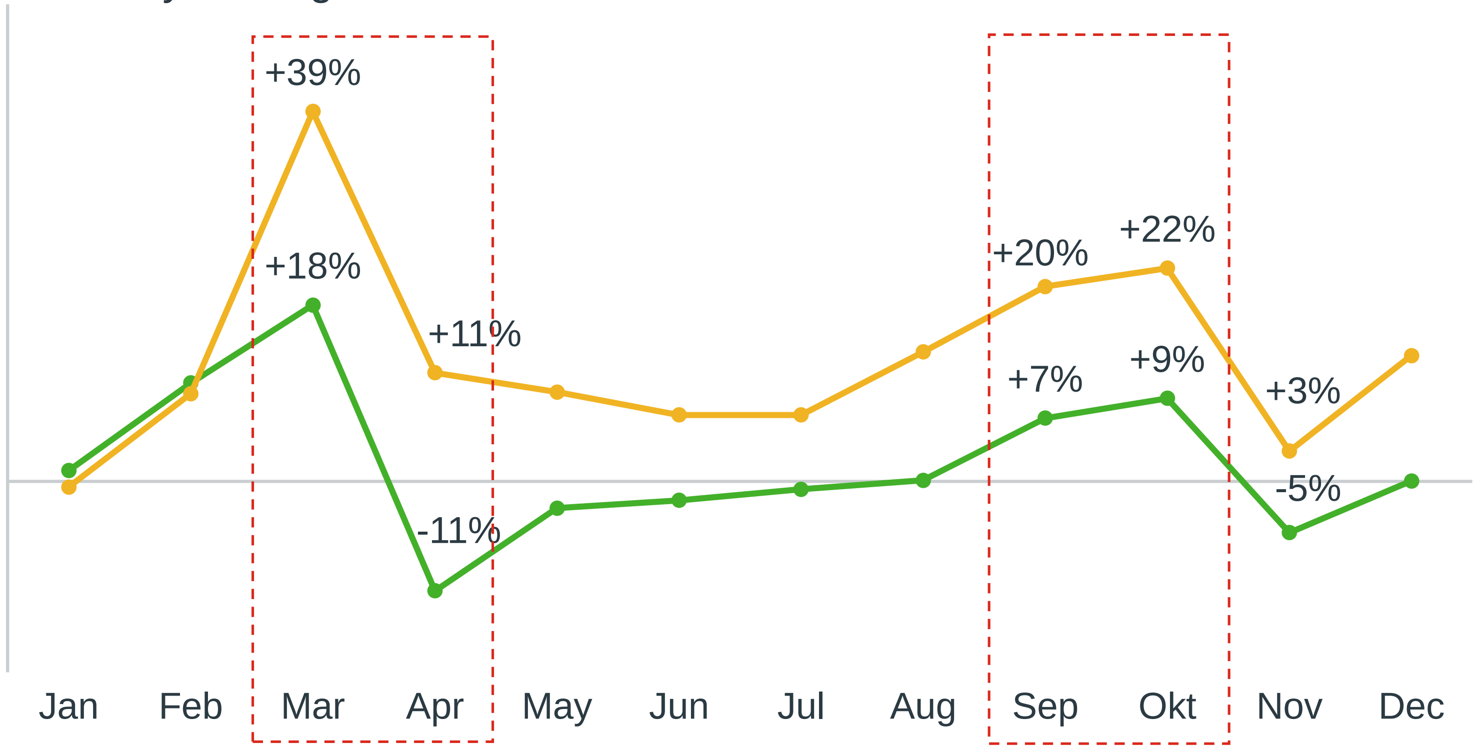
More than 54% (+46.8 M) of the Consumer Health market growth in absolute terms is provided by drugstores

MAT Dec 20

Pharmacies streetprice value CHF 2'168.0 M (+40.4 M / +1.9%)

Drugstores streetprice value CHF 416.7 M (+46.8 M / +12.7%)

monthly value growth in % 2020 vs. 2019



Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

Redistribution Swissmedic list C

+3.9M growth of drugstores due to new products on **list D**

Location plays an important role

-18% value decrease in pharmacies at & near **train stations**

+13% value increase in drugstores in **rural areas**

Location information according to self-assessment of the participating pharmacies and drugstores. The number of shops located in the station area is 63.

IQVIA CONSUMER HEALTH

The total number of customers has decreased slightly by -1.1% overall, with a large shift from central locations to rural areas

General consumer behavior in 2020

Ø 5’500

Customers per month
for pharmacies & drugstores

1.6

Items are in the Ø shopping basket

CHF 44.24

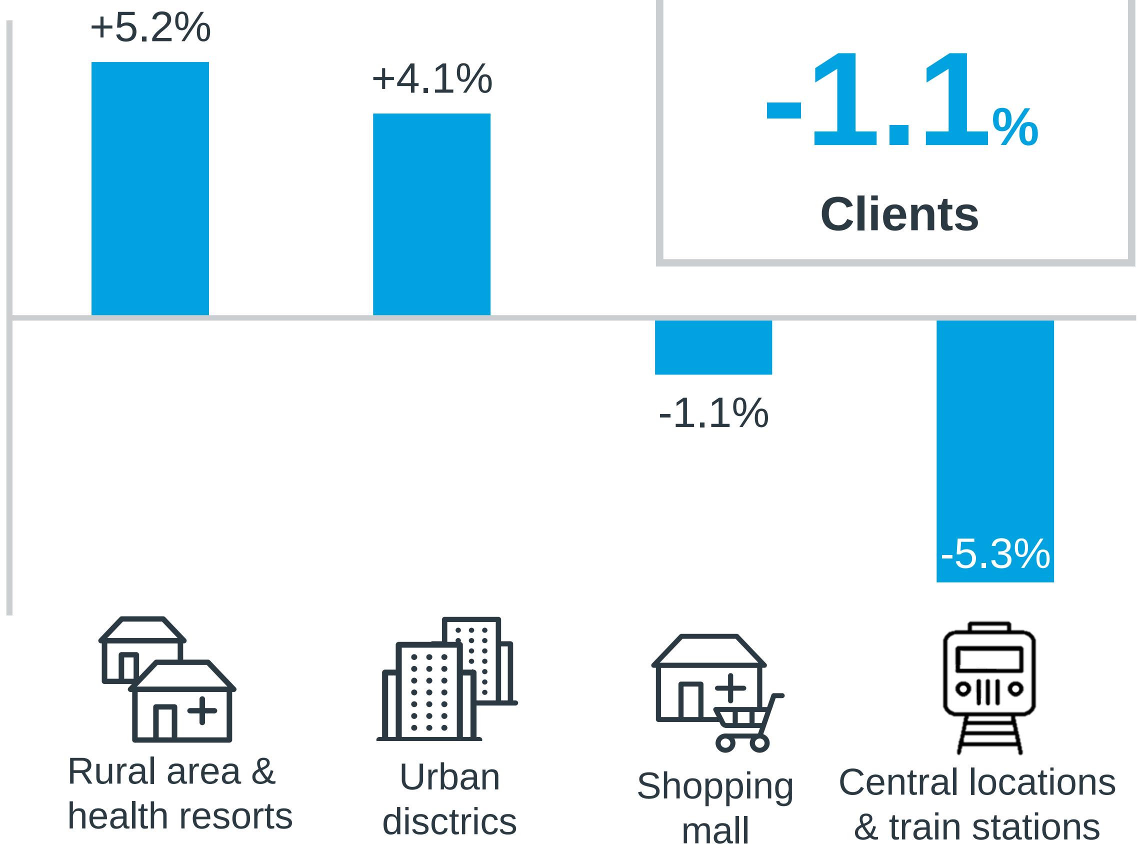
Ø transaction amount (Rx+OTC)

Change in the number of customers by location 2020 vs. 2019

Overall

-1.1%

Clients



Source: IQVIA transaction data total Rx+OTC, Channels: Pharmacies & Drugstores.

Location information according to self-assessment of the participating pharmacies and drugstores

IQVIA CONSUMER HEALTH

How the Corona Pandemic impacted the Consumer Health Market in 2020

IQVIA CONSUMER HEALTH

Unusual dynamic in the OTC segment: Not SL products grow significantly stronger in value (+4.8%) than SL articles (+3.2%)

However, pack growth is higher in the SL market

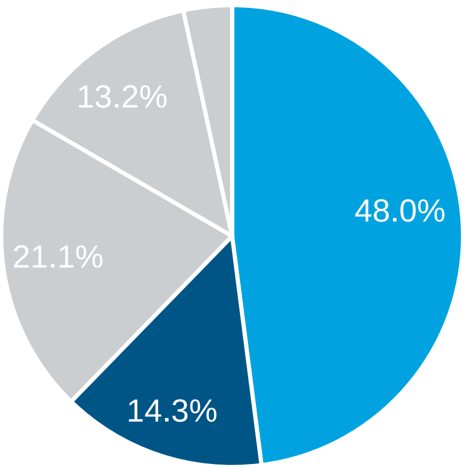
MAT Dec 20

Streetprice value in CHF
2’584.7 M (+52.9 M / +3.5%)

Nutrition
87.7 M
(+3.4 m / +4.0%)

Patient Care
342.1 M
(+37.4 M /+12.3%)

Personal Care
545.0 M
(-21.2 M / -3.7%)



OTC IQVIA
1’610.0 M
(+67.6 M / +4.4%)

OTC IQVIA
not SL
1’239.9 M
(+56.3 M / +4.8%)

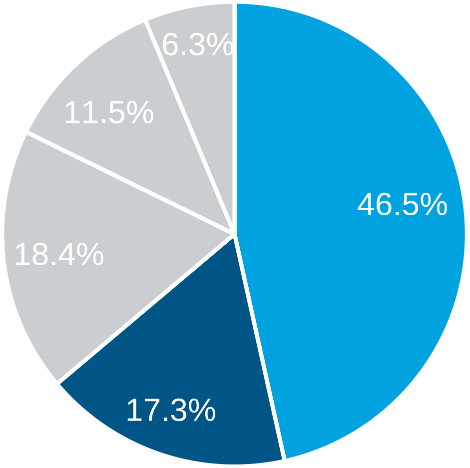
OTC IQVIA SL
370.0 M
(+11.3 M / +3.2%)

Volume in packs
143.5 M (+1.9 M / +1.3%)

Nutrition
9.0 M
(+0.1 M / +1.0%)

Patient Care
16.4 M
(+1.5 M / +10.1%)

Personal Care
26.4 M
(-0.9 M / -3.4%)



OTC IQVIA
91.6 M
(+1.2 M / +1.3%)

OTC IQVIA
not SL
66.8 M
(+0.5 M / +0.8%)

OTC IQVIA SL
24.8 M
(+0.7 M / +3.0%)

Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

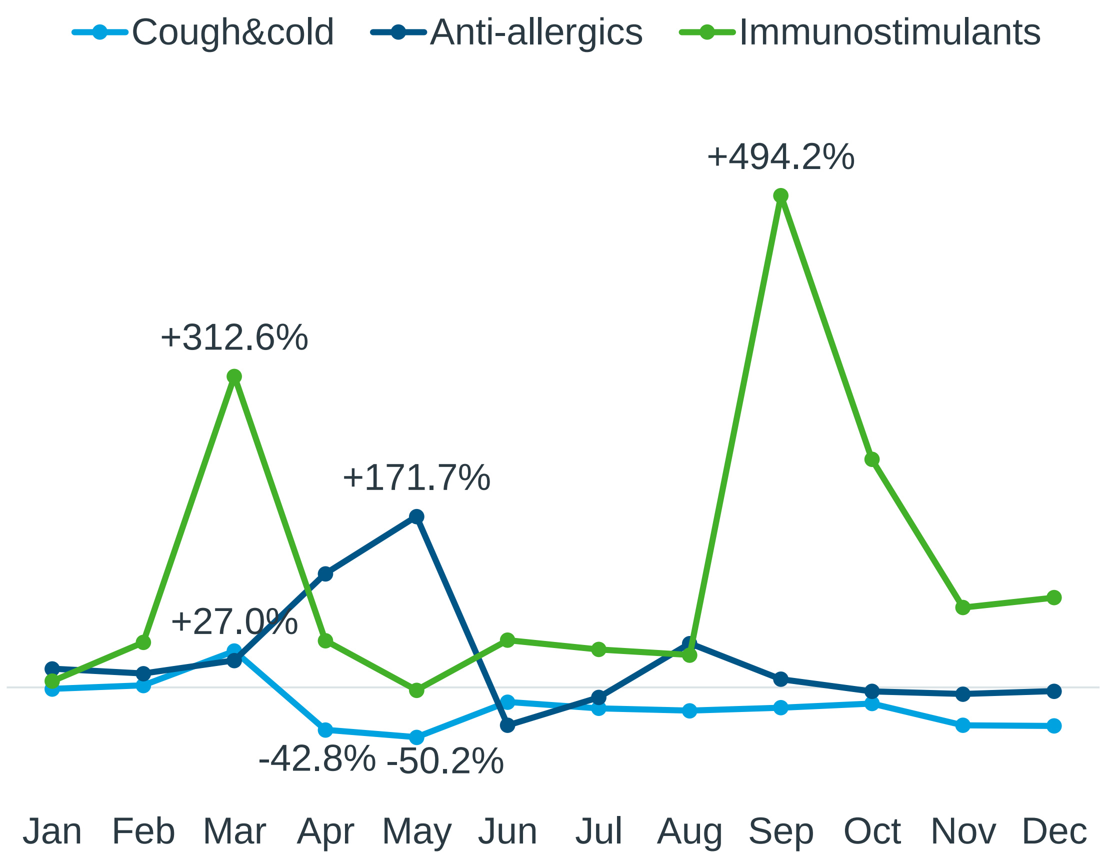
IQVIA CONSUMER HEALTH

Total cough & cold shows a decrease in value of -4.5%, with two groups showing the opposite positive trend: immunostimulants and antiallergics

Total cough & cold market (without 01B4, 01E1) streetprice value in CHF 224.6 M (-46.7 M / -17.2%)

Top 10 markets in 01	Value streetprice 2020 in M CHF	Growth 2020
Total cough & cold, others	295.0	-4.5%
Immunostimulants	47.3	+135.3%
Nasal decongestants	43.8	-11.8%
Sore throat remedies	43.5	-16.3%
Cold remedies	40.5	-22.7%
Chesty Cough Products	29.5	-24.3%
Anti-allergics	22.9	+32.4%
Nasal saline solutions	21.2	-0.5%
Products for oth. resp. conditions	17.5	-12.6%
Dry cough products	15.6	-30.4%
Decongestant rubs& inhalants	12.3	-9.5%
Rest	1.0	-14.6%

Monthly value growth 2020 vs. previous year

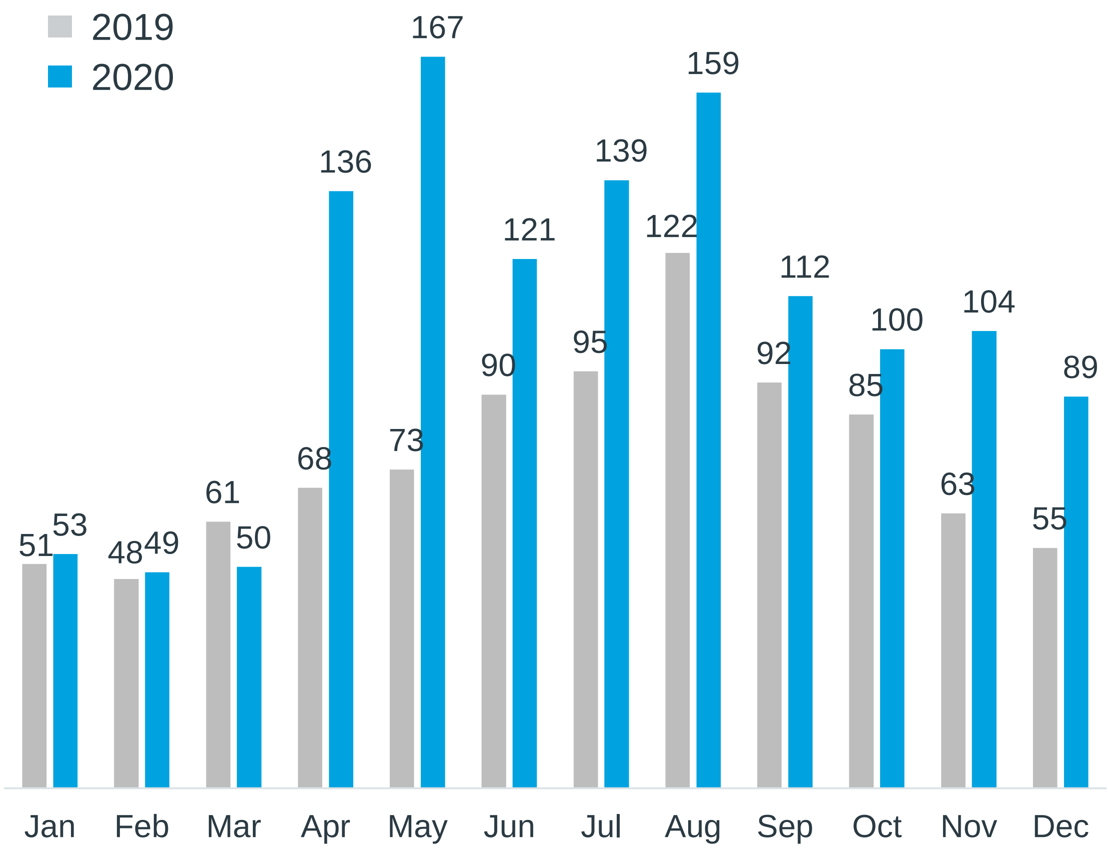


Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

IQVIA CONSUMER HEALTH

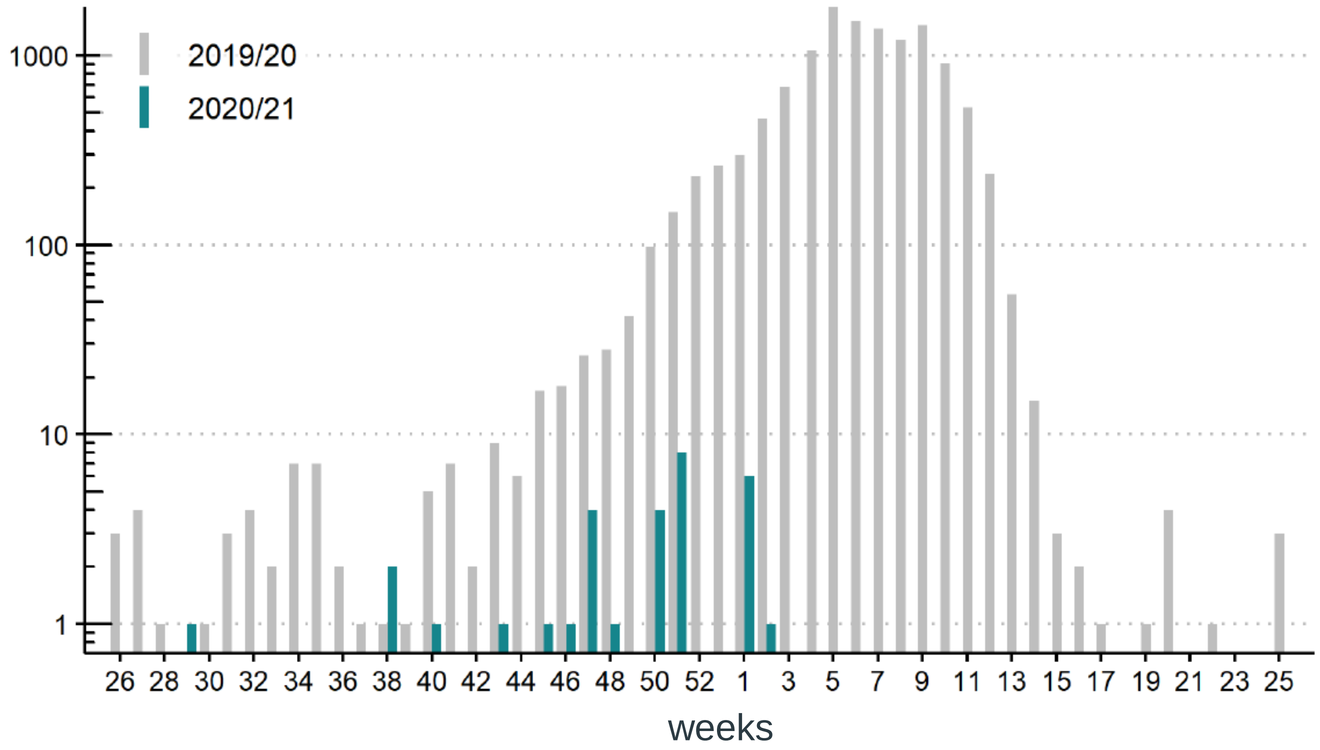
Few confirmed influenza cases and low sales in cough & cold remedies result in full stocks at pharmacies and drugstores

stock range in days for total cough & cold packs



Total cough&cold without 01B4 immunostimulants and 01E1 anti-allergics
Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

number of positive influenza cases

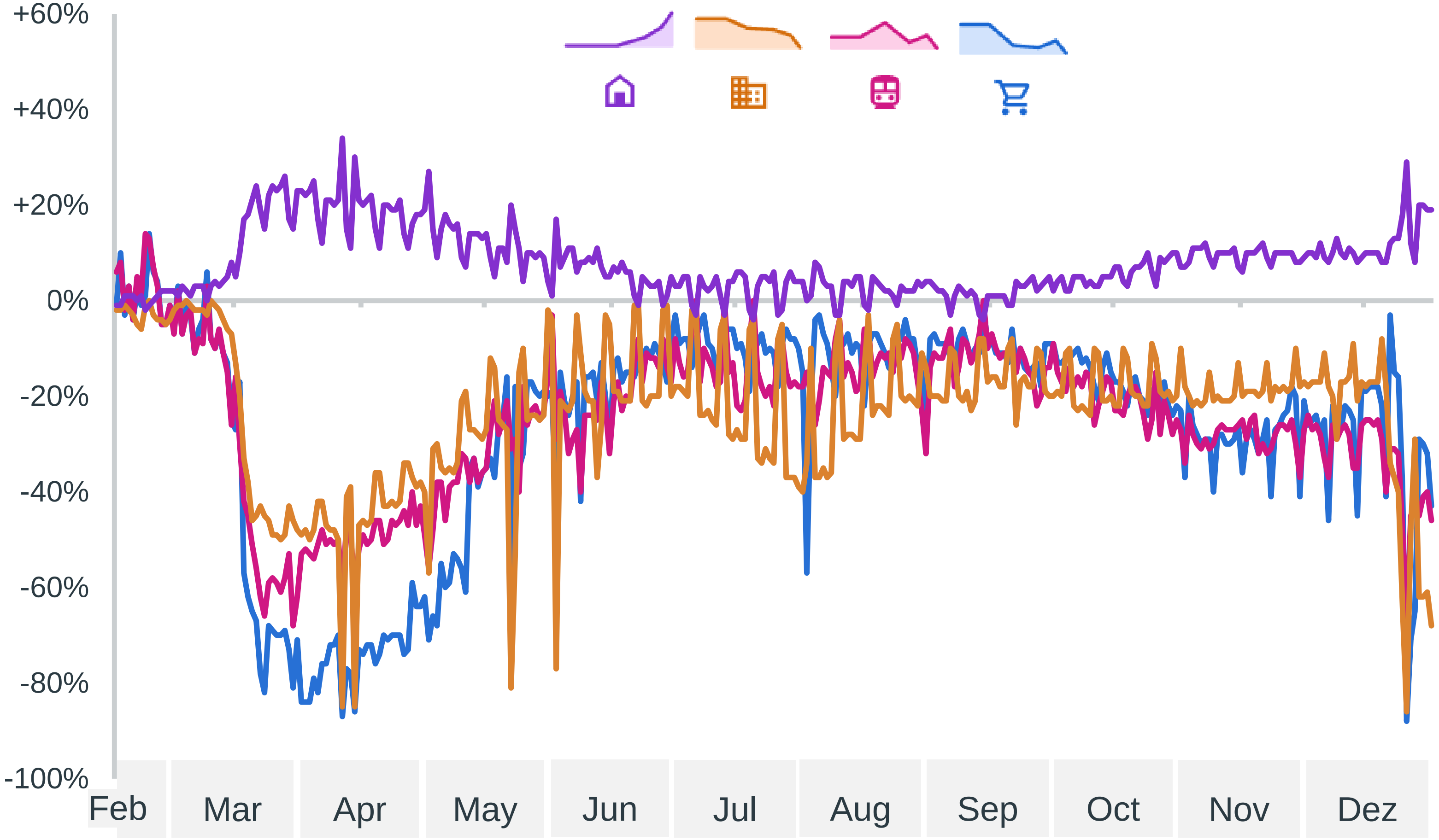


Source: BAG, Sentinella Statistik. https://www.bag.admin.ch/

IQVIA CONSUMER HEALTH

One of the reasons for the decrease of influenza cases is the reduced attendance in public places and the resulting decrease in personal contacts

Measures against the spread of coronavirus are equally effective against influenza viruses



+8% increase in **residential** traffic

-28% decrease in **workplace** attendance

-24% decrease in **train station** attendance

-23% reduction in **retail** site attendance

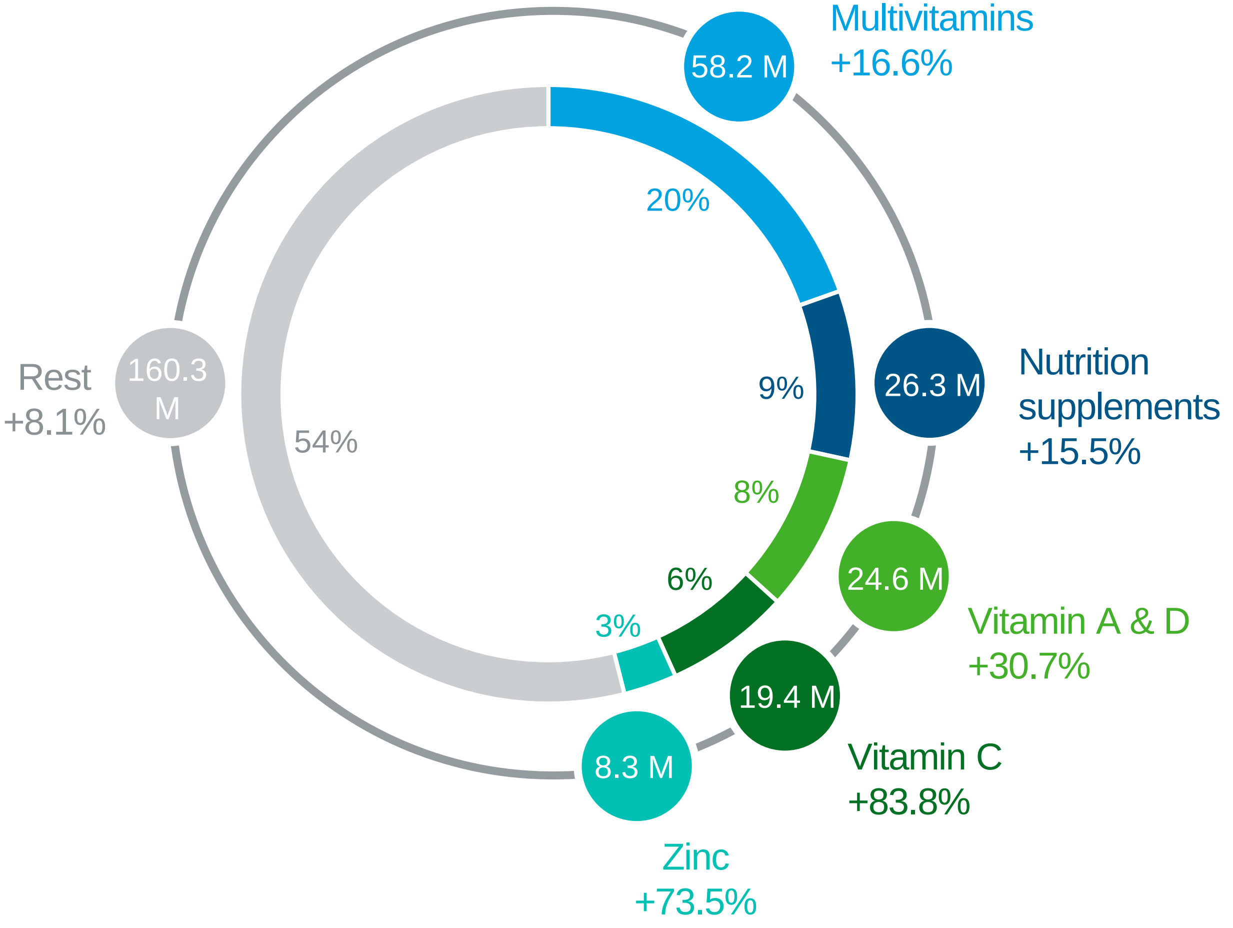
Source: Google LLC "Google COVID-19 Community Mobility Reports". https://www.google.com/covid19/mobility/ Accessed: 26.01.2021

Average percentage calculated on the basis of daily values

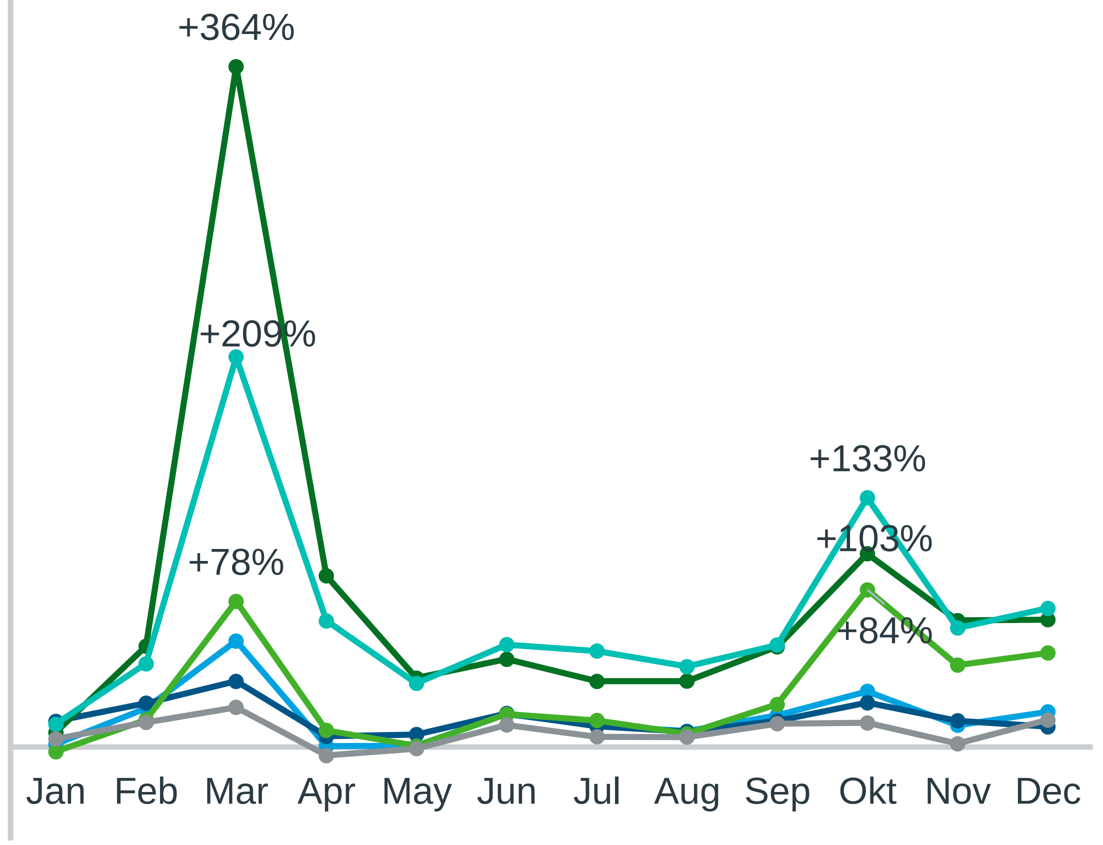
IQVIA CONSUMER HEALTH

Prophylactic vitamins & minerals increased significantly in sales with a peak in March and October

Total 04 Vitamins, Mineral, Nutrition supplements CHF 297.0 M (+42.0 M / +16.5%) *MAT Dec 20*



monthly value growth 2020 vs. previous year



Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

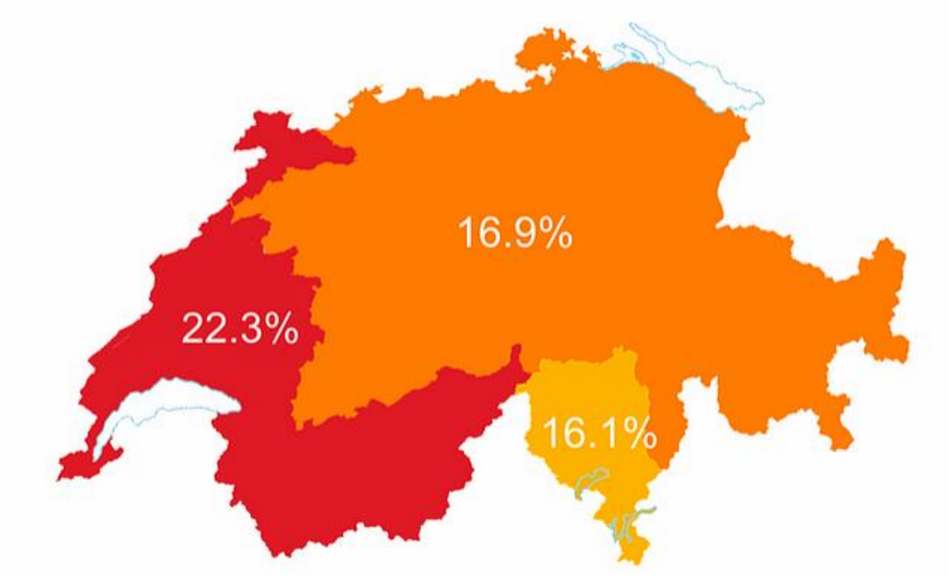
IQVIA CONSUMER HEALTH

But the pandemic also increases stress levels and sales of OTC tranquilizing and mood enhancing products

Share of people with maximum stress level

11.4% April 2020
20.0% November 2020

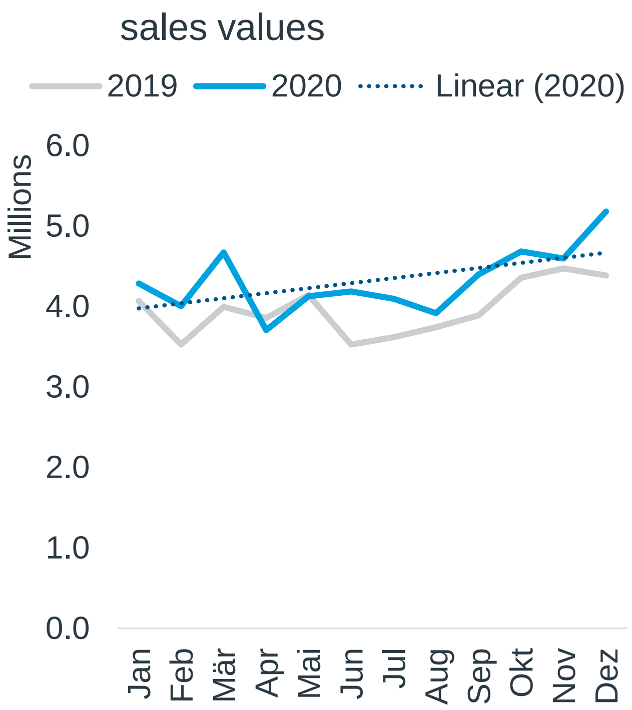
share of people with severe depressive symptoms in November 2020 per region

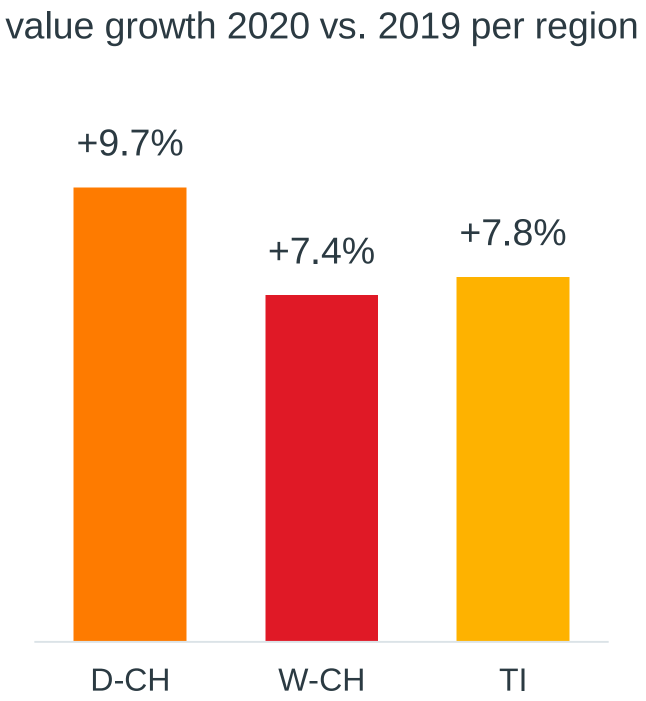


Source: Corona Stress Study, University Basel. https://www.coronastress.ch/

Calming, sleeping & mood enhancing products

streetprice value in CHF 51.8 M
+4.3 M / +9.0%





OTC-class: 13 Calming, sleeping & mood enhancing products
Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

IQVIA CONSUMER HEALTH

Looking at the other segments:
PEC decline continues (-3.7%) and positive trend for NUT (+4.0%)

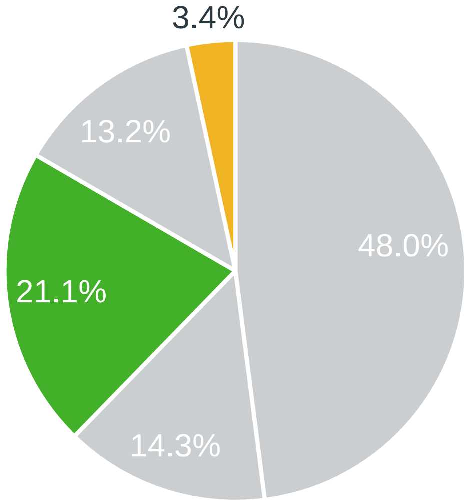
MAT Dec 20

Streetprice value in CHF
2'584.7 M (+87.2 M / +3.5%)

Nutrition
87.7 M
(+3.4 m / +4.0%)

Patient Care
342.1 M
(+37.4 M /+12.3%)

Personal Care
545.0 M
(-21.2 M / -3.7%)



OTC IQVIA
1'610.0 M
(+67.6 M / +4.4%)

OTC IQVIA
not SL
1'239.9 M
(+56.3 M / +4.8%)

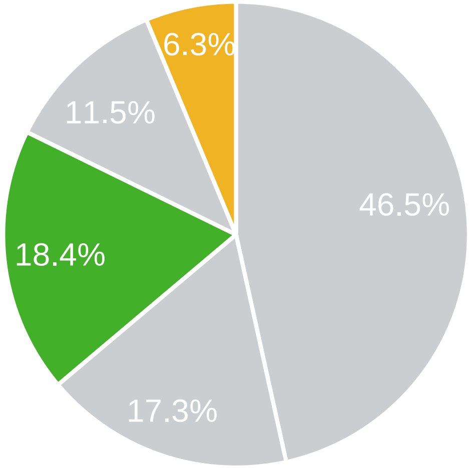
OTC IQVIA SL
370.0 M
(+11.3 M / +3.2%)

Volume in packs
143.5 M (+1.9 M / +1.3%)

Nutrition
9.0 M
(+0.1 M / +1.0%)

Patient Care
16.4 M
(+1.5 M / +10.1%)

Personal Care
26.4 M
(-0.9 M / -3.4%)



OTC IQVIA
91.6 M
(+1.2 M / +1.3%)

OTC IQVIA
not SL
66.8 M
(+0.5 M / +0.8%)

OTC IQVIA SL
24.8 M
(+0.7 M / +3.0%)

Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

IQVIA CONSUMER HEALTH

Beauty products lose importance during lock-down
Nutrition increase comes from strong growth in drugstores (+15.8%)

Personal Care streetprice value 2020
CHF 545.0 M (-21.2 M / -3.7%)

Make up	**-9.6 M / -21.0%**
Sun products	**-6.1 M / -13.5%**
Facial care	**-5.5 M / -3.6%**
Fragrances	**-3.9 M / -9.3%**
Insect repellents	**-3.1 M / -26.8%**

Home office, closing public places, reducing social contacts, significantly reducing vacations abroad

Hand care	**+2.6 M / +30.0%**
Hand hygiene	**+4.4 M / +87.8%**

Hygiene measures

Nutrition streetprice value 2020
CHF 87.7 M (+3.3 M / +4.0%)

Pharmacies
CHF 60.0 M
-0.4 M / -0.7%

Drugstores
CHF 27.7 M
+3.8 M / +15.8%

Food for adults	**+3.5 M / +12.0%**
Enteral nutr. products	**+1.0 M / +8.9%**
Confectionary	**+0.4 M / +7.1%**
Gluten-free & low protein	**+0.2 M / +11.3%**

Shift of customer flow from central to residential areas, prohibition of shopping tourism

Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

IQVIA CONSUMER HEALTH

Not surprisingly Patient Care segment continues with double digit growth (+12.3%)

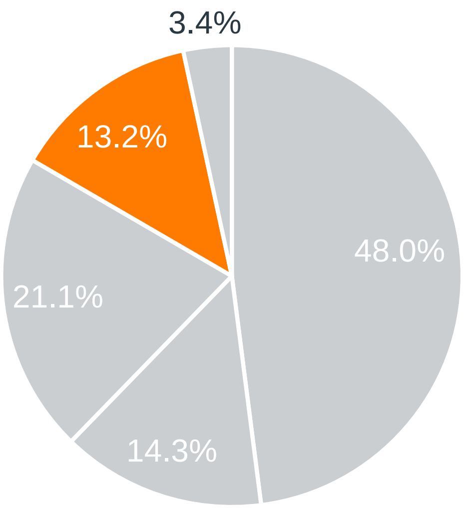
MAT Dec 20

Streetprice value in CHF
2’584.7 M (+52.9 M / +3.5%)

Nutrition
87.7 M
(+3.4 m / +4.0%)

Patient Care
342.1 M
(+37.4 M /+12.3%)

Personal Care
545.0 M
(-21.2 M / -3.7%)



OTC IQVIA
1’610.0 M
(+67.6 M / +4.4%)

OTC IQVIA
not SL
1’239.9 M
(+56.3 M / +4.8%)

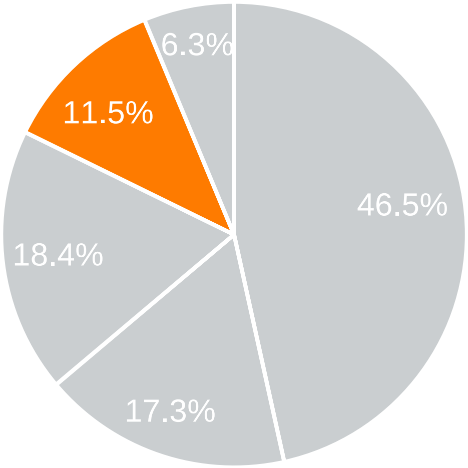
OTC IQVIA SL
370.0 M
(+11.3 M / +3.2%)

Volume in packs
143.5 M (+1.9 M / +1.3%)

Nutrition
9.0 M
(+0.1 M / +1.0%)

Patient Care
16.4 M
(+1.5 M / +10.1%)

Personal Care
26.4 M
(-0.9 M / -3.4%)



OTC IQVIA
91.6 M
(+1.2 M / +1.3%)

OTC IQVIA
not SL
66.8 M
(+0.5 M / +0.8%)

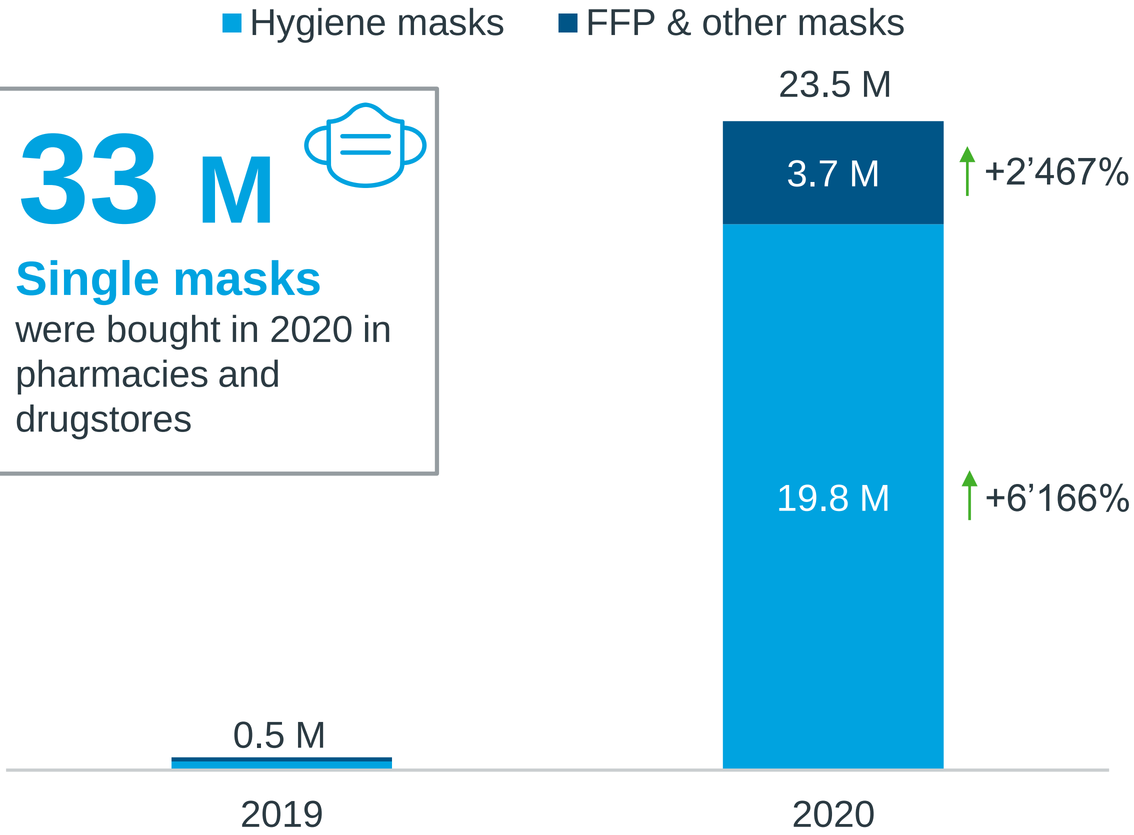
OTC IQVIA SL
24.8 M
(+0.7 M / +3.0%)

Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

IQVIA CONSUMER HEALTH

Facial masks dominate growth in PAC whereas over 80% of the revenue comes from classical hygiene masks

Masks SP value in CHF in pharmacies and drugstores



33 M

Single masks

were bought in 2020 in pharmacies and drugstores

Corona tests in pharmacies start in November 2020

237 **Pharmacies** are allowed to provide rapid corona antigen tests*

16’640

Single tests

conducted in pharmacies in 2020

146.2

thousand CHF

Value of corona tests in 2020, of these, CHF **99.7** thousand were in December

Leading manufactures corona tests in 56J9

Roche Diagnostics
LumiraDX
Willi Fox
Waefler Diagnostics
Abbott

Source: IQVIA PharmaTrend, Channels: Pharmacies & Drugstores

**Data status: February 2021*

IQVIA CONSUMER HEALTH

How the Corona Pandemic impacted the Consumer Health Market in 2020

+ Market Overview and Consumer Behavior

+ Consumer Health Market Deep Dive and the Impact of COVID-19

+ Outlook for 2021 with two possible scenarios

IQVIA CONSUMER HEALTH

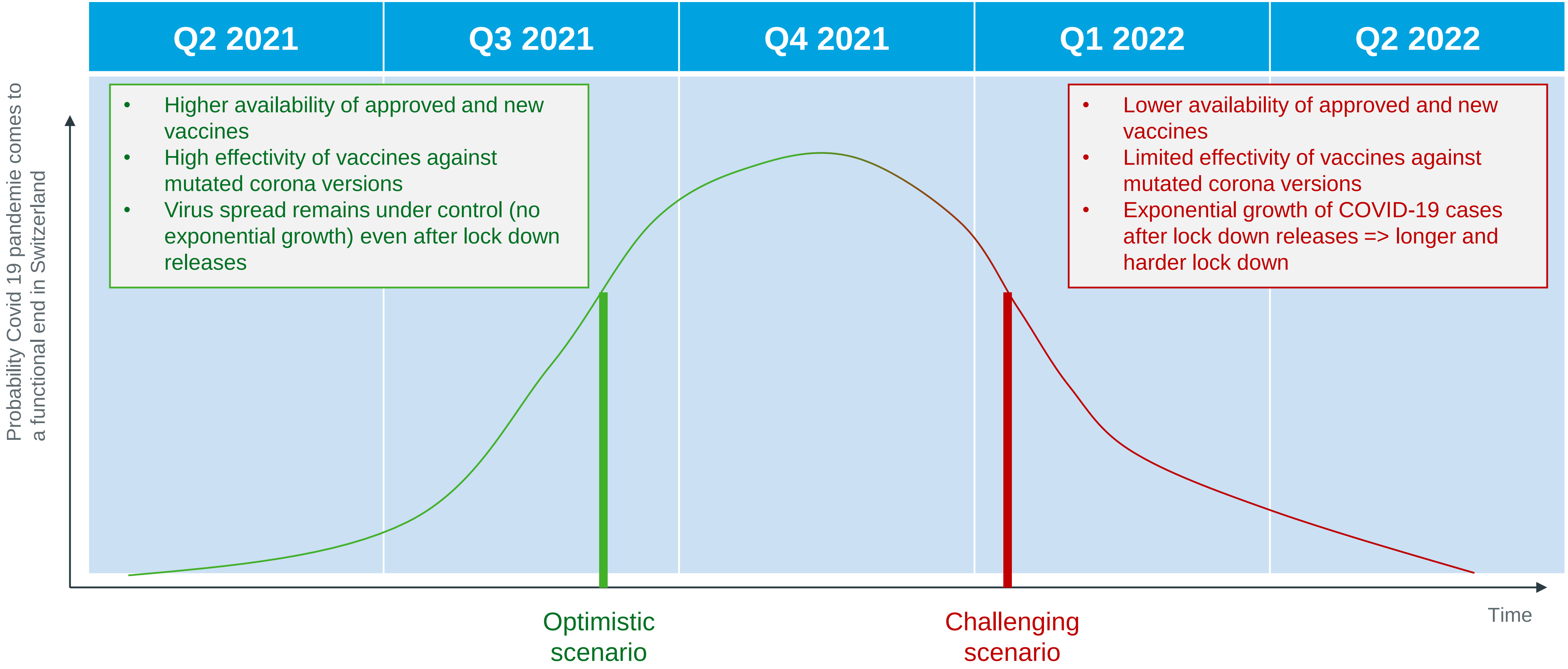
At the moment, we see two key drivers for the pandemic development in 2021

While increasing vaccine availability should slow the momentum of covid spread, the discovered mutations could introduce new uncertainties

Availability of SARS-CoV-2 vaccination

Spread of new corona mutations

We currently assume the end of the pandemic for Q4 2021 mainly due to increasing vaccination of Swiss population



For the OTC market, demand for preventive products and the return of the next wave of colds are the main drivers

<table>
<tr><th></th><th>Q1</th><th>Q2</th><th>Q3</th><th>Q4</th></tr>
<tr><td>Optimistic scenario</td><td rowspan="2">Weak cold business
Low spread of flu and cold viruses as a result of contact restrictions leads to very weak business in the core OTC business</td><td colspan="2">Declining demand for prevention
Decrease in demand for vitamin products/ Echinaforce etc. due to increasing vaccination coverage and decreasing number of cases</td><td>Likely above-average business with flu and cold products following low spread of cold viruses in winter 2020/2021</td></tr>
<tr><td>Challenging scenario</td><td colspan="2">Ongoing need for self-prevention
• Continued high sales of vitamins, Echinaforce and similar products
• Increasing demand for non Rx antidepressants</td><td>Another weak cold season due to continued contact restrictions</td></tr>
</table>

The PAC segment would benefit the most in case the pessimistic scenario becomes real

	Q1	Q2	Q3	Q4
Optimistic scenario	**Demand stable at a high level** Ongoing strong demand for masks, increasingly also for FFP2 masks	**Omnipresent hand hygiene** • Continued high demand for disinfectants (also beyond Q2) • Declining demand for FFP2 masks	**Corona vaccinations in pharmacies** • Additional customer frequency and demand beyond hygiene articles • Decreasing demand for rapid tests and masks	**Recovery in the standard range** Normalization of demand for products outside the hygiene range
Challenging scenario		**Strongly spreading virus mutations + new protective measures** Very high turnover with FFP2 masks	**Quick and self tests** • Testing capacities to be greatly expanded • Vaccinations still not available in pharmacies	**Hygiene products remain dominant** Continued strong demand for masking and hygiene products, albeit at falling prices

IQVIA CONSUMER HEALTH

PEC only has a realistic chance to recover this year if the pandemic and their restrictions end in Q3

<table>
<tr><th></th><th>Q1</th><th>Q2</th><th>Q3</th><th>Q4</th></tr>
<tr><td>Optimistic scenario</td><td rowspan="2">Lock-down leads to further decline
Continued low demand for cosmetic products due to ongoing contact restrictions
Sales bans on certain products due to store closures</td><td>Border openings
Reopening of borders leads to shift in demand
Decrease in demand for food supplements</td><td>Return to normality for major events
Recovery due to seasonally low number of cases + Progress of vaccination campaign, especially in cosmetics sector</td><td>Sales growth
Above-average business mainly due to backlog demand from 2020 and high customer frequency due to vaccination</td></tr>
<tr><td>Challenging scenario</td><td colspan="3">High case numbers and lock-down
Contact restrictions and lock-down lead to further decline in PEC sales
Continued strong demand for dietary supplements</td></tr>
</table>

IQVIA CONSUMER HEALTH

The implications of the optimistic scenario are most likely more positive for the overall market growth in 2021

Expected impact of both scenarios on market growth in 2021 (indicative)

Market segment	Optimistic scenario		Challenging scenario	
	1^{st} half	2^{nd} half	1^{st} half	2^{nd} half
OTC	↘	↗	↘	↘
PAC	→	↘	↗	→
PEC+NUT	→	↗	↘	↘

Pharmamarket Switzerland 2020 and the Influence of the Corona Pandemic

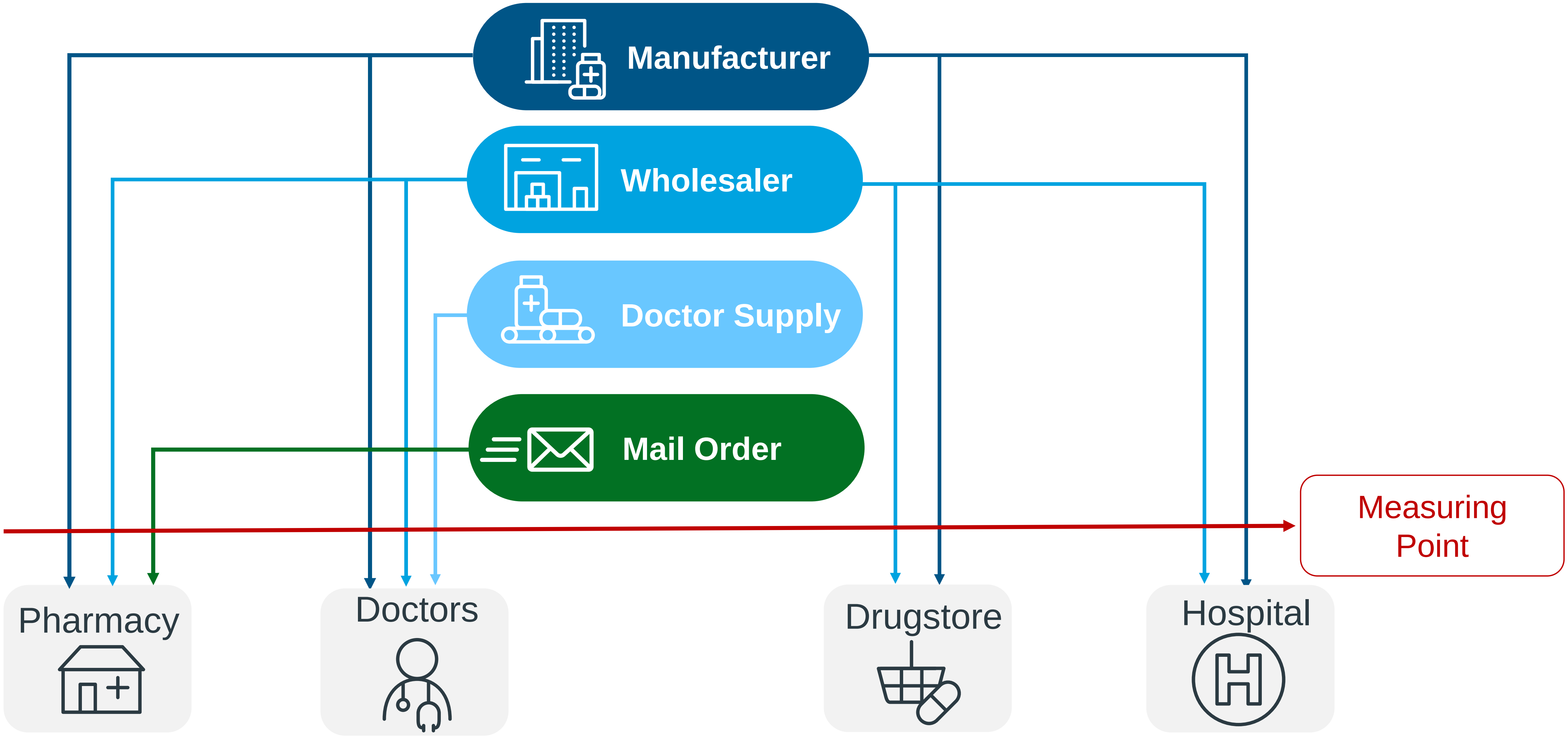
Client Webinar - February 11th 2021

Stephanie Burri
Manager Supplier Services

Pharmamarket Switzerland 2020
and the Influence of the Corona Pandemic

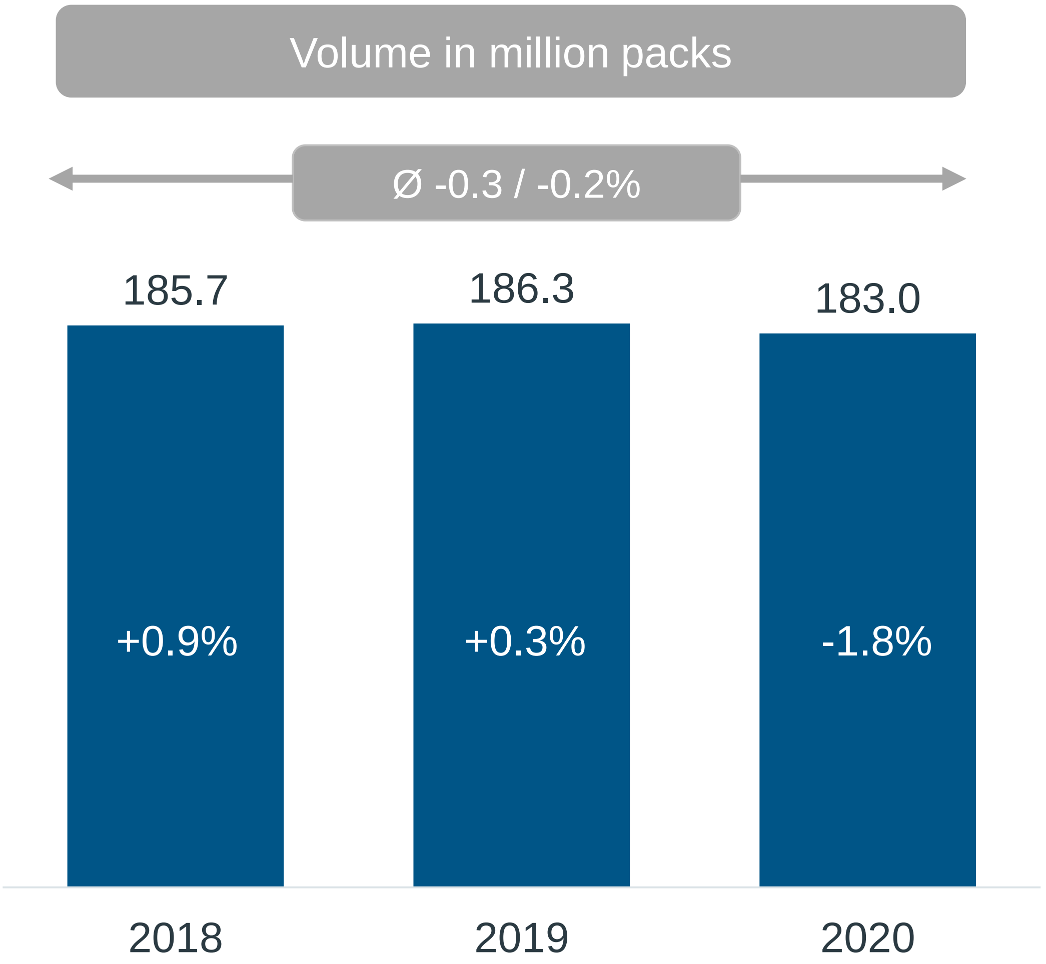
+ Overall market development and key drivers
+ Impact of COVID-19
+ SL market with protected and off patent sectors
+ Outlook for 2021 with two possible scenarios

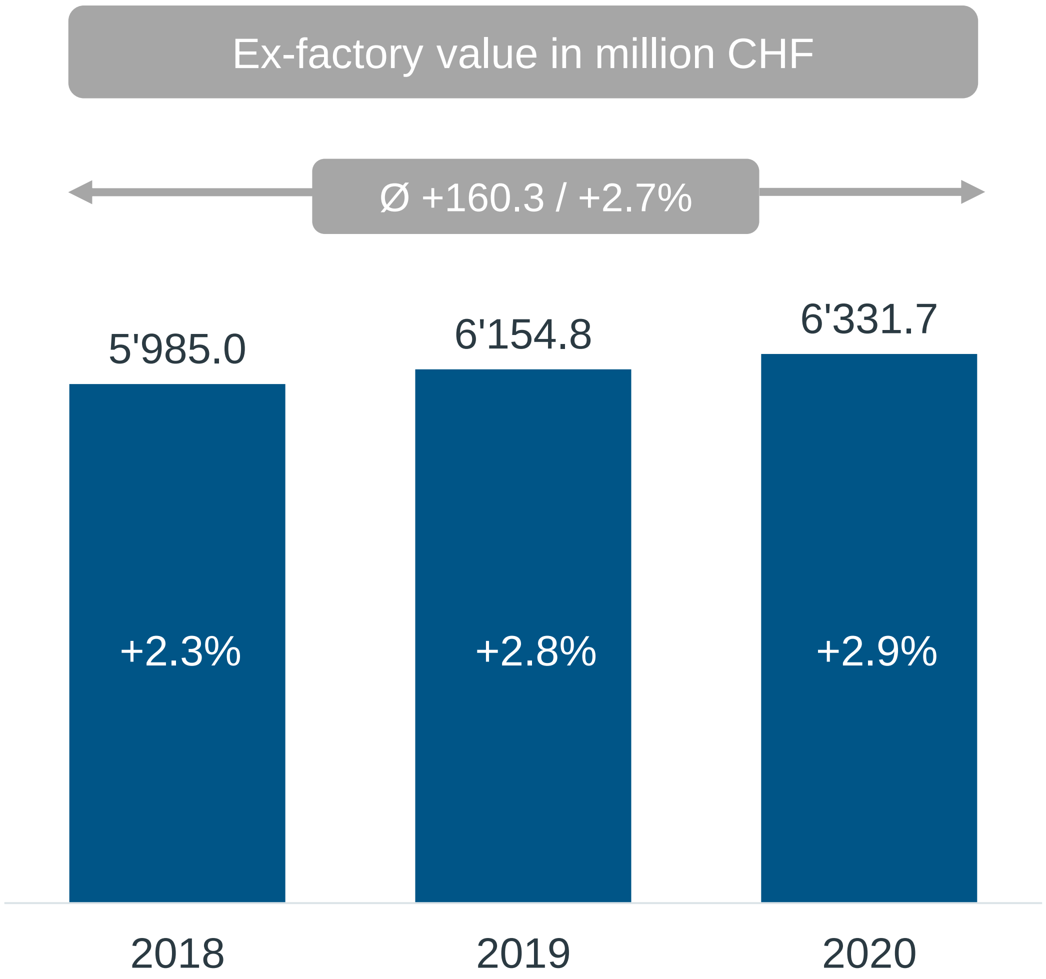
Distribution pharma market Switzerland (census data)



Sales grow by almost 3% to a solid CHF 6.3 billion in 2020

Reduced sales of cold remedies result in -1.8% lower package volume





Quelle: IQVIA iQPharma, APO/SD/DRO/SPI

The impact of new products to market growth is low in 2020, but sales of previously launched innovations reduce the effect of price cuts

Elements of Growth

FY 2020

Total market growth

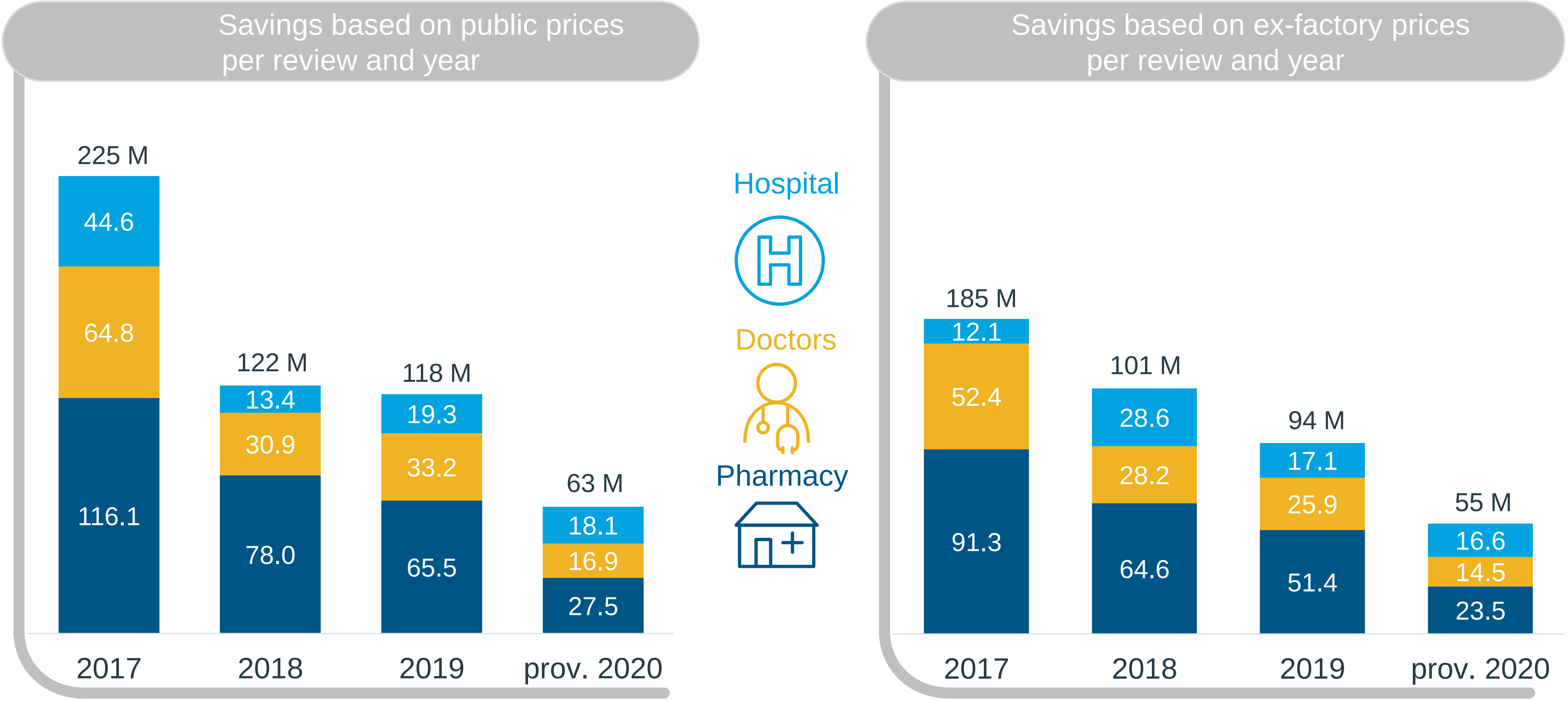
+2.9%

*Volume changes: Share of turnover growth due to increased sales of products launched before the current MAT.
**Interactive Effects: Caused by simultaneous interactions of price and volume changes.
**Residual Effects: Change in existing forms from smaller to larger packaging units or vice versa.

Source: IQVIA MIDAS, Total Market

The saving effect from the FOPH price review 2020 is lowered to approximately CHF 63 M per year at public prices

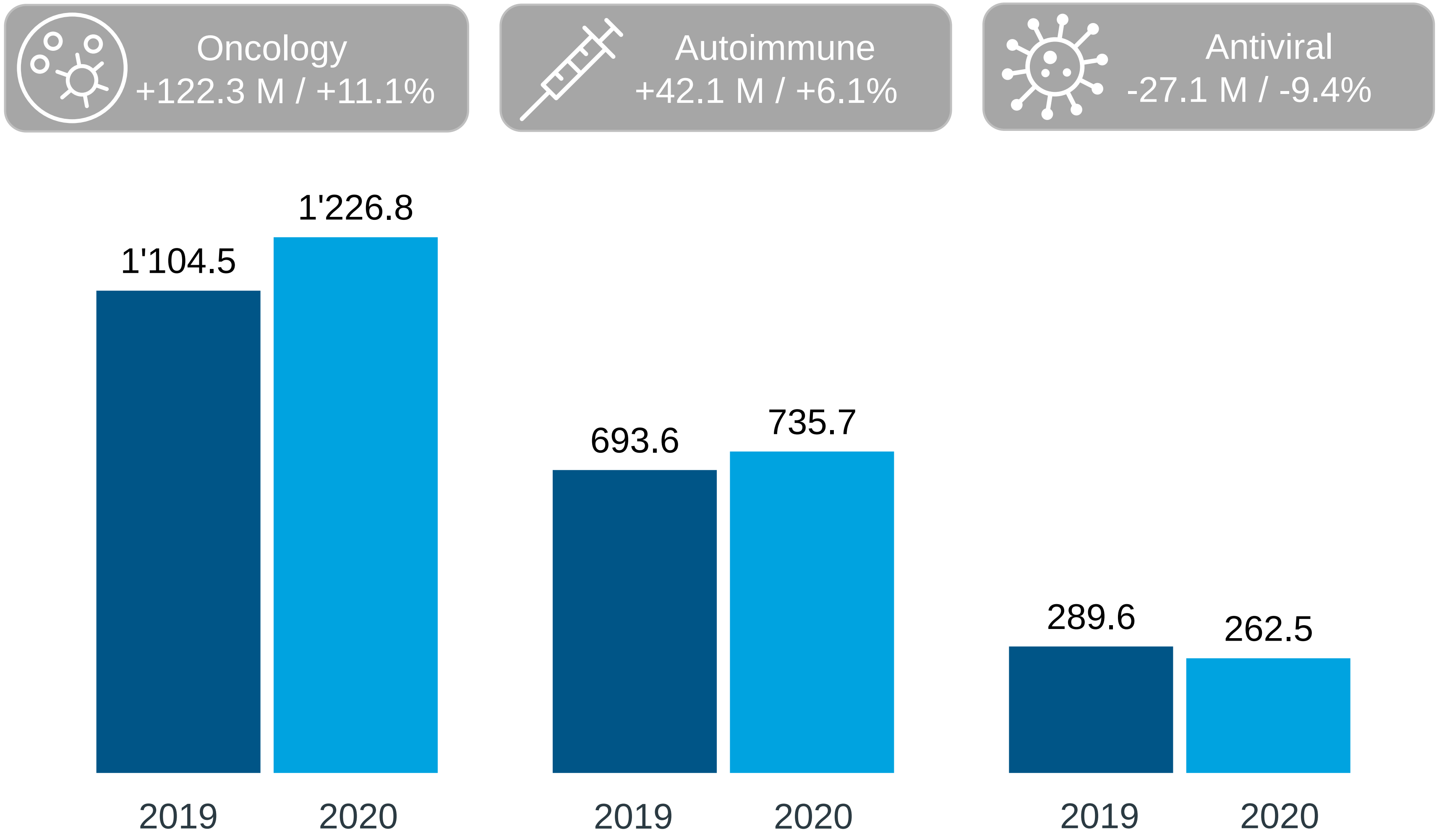
Based on constant sales volumes



Source: IQVIA APO/SD/SPI SL products, based on input FOPH

The three indications cancer, autoimmune diseases and antivirals generate over one third of total sales and over 75% of all growth

Ex-factory value CHF 2’224.9 M (+137.3 M / +6.6%)



Source: IQVIA iQPharma, APO/SD/DRO/SPI

Pharmamarket Switzerland 2020
and the Influence of the Corona Pandemic

- + Overall market development and key drivers
- + Impact of COVID-19
- + SL market with protected and off patent sectors
- + Outlook for 2021 with two possible scenarios

Sales: Overall market development unchanged to previous 3 years, hospitals with 50% lower growth in 2020 compared to 2019

In addition to OTC flu & cold remedies, Rx packs are also decreasing in volume

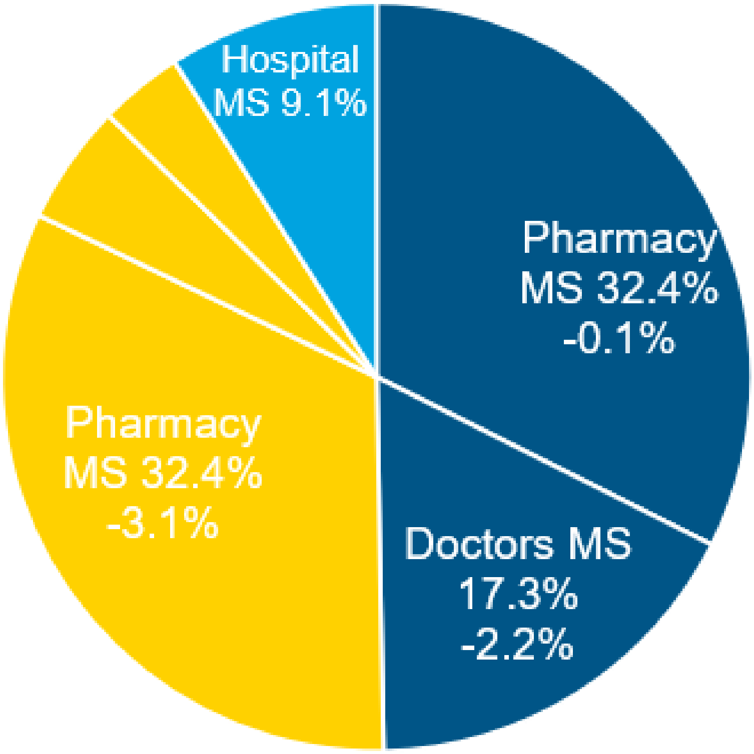
FY 2020

Volume in packs
183.0 (-3.3 M / -1.8%)

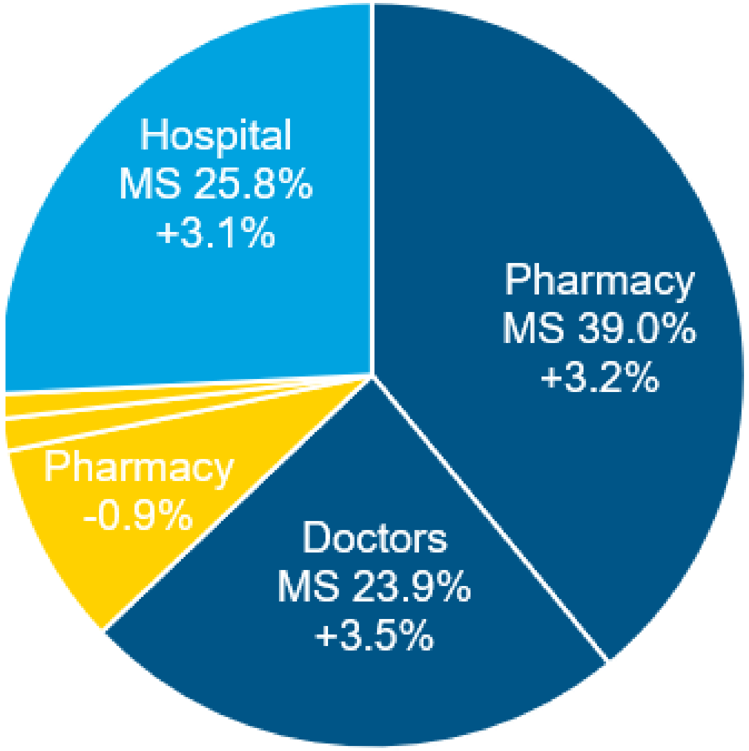
Hospital
16.6 M
-3.2%
-0.5 M
MS 9.1%

OTC
75.4 M
-2.6%
-2.0 M
MS 41.2%

Rx
90.9 M
-0.8%
-0.8 M
MS 49.7%



Ex-factory value in CHF
CHF 6’331.7 M (+176.9 M / +2.9%)



Hospital
1’633.9 M
+3.1%
+49.3 M
MS 25.8%

OTC
713.6 M
-0.1%
-0.9 M
MS 11.3%

Rx
3’984.1 M
+3.3%
+128.5 M
MS 62.9%

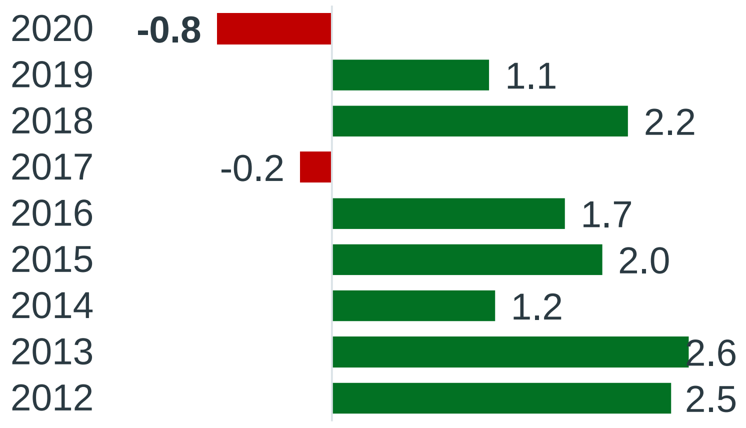
Source: IQVIA iQPharma, APO/SD/DRO/SPI

Looking at the Rx volume sales 2020, we see a decline in many indications due to overall reduced doctor visits

Rx market negativ pack sales for the second time only in the last 10 years

Declining pack sales in Rx market in 2020 by -0.8 M (-0.8%)

Rx volume change in %



Significantly less packs prescribed by general practitioners in 2020

Prescriptions from GPs decline by

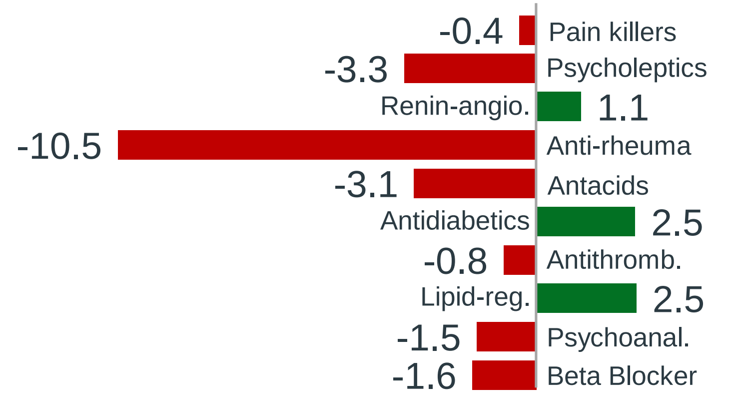
-1.5M

-2.9%

Over 54% (49 M packs) of all Rx products sold in retail market are prescribed by GPs.

7 out of the top 10 ATC 2 markets in GP decline

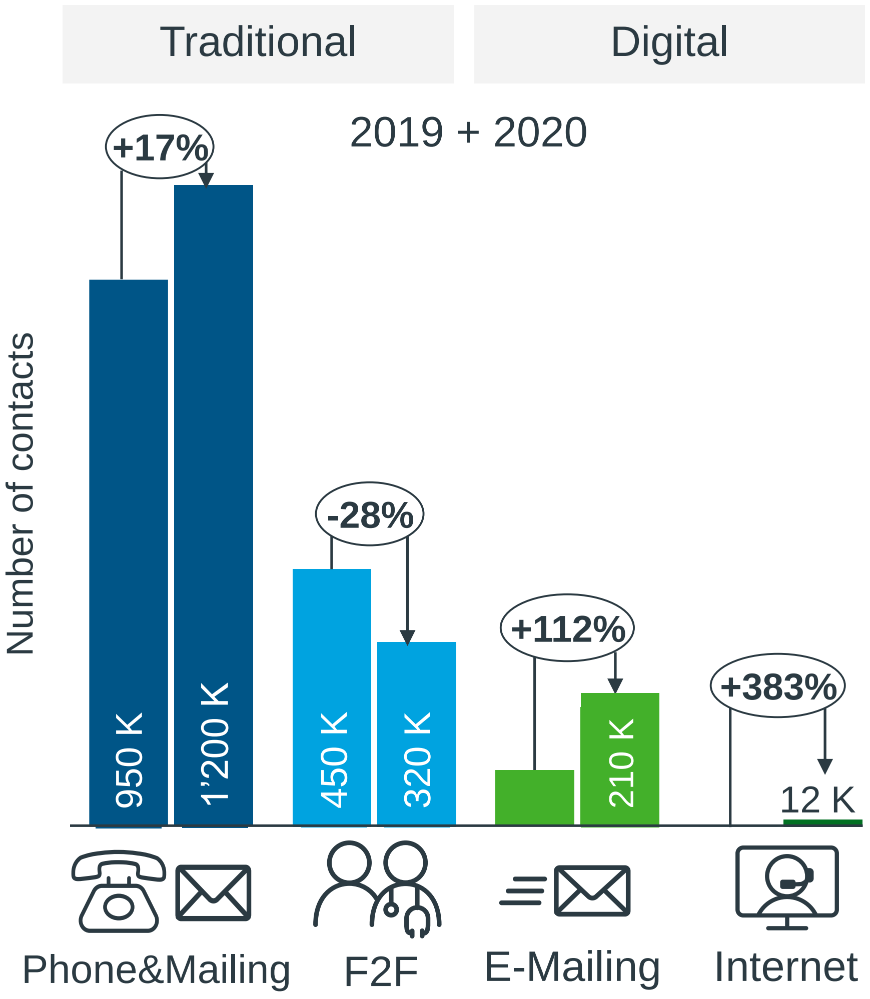
Top 10 ATC pack change in %
2020 vs. 2019



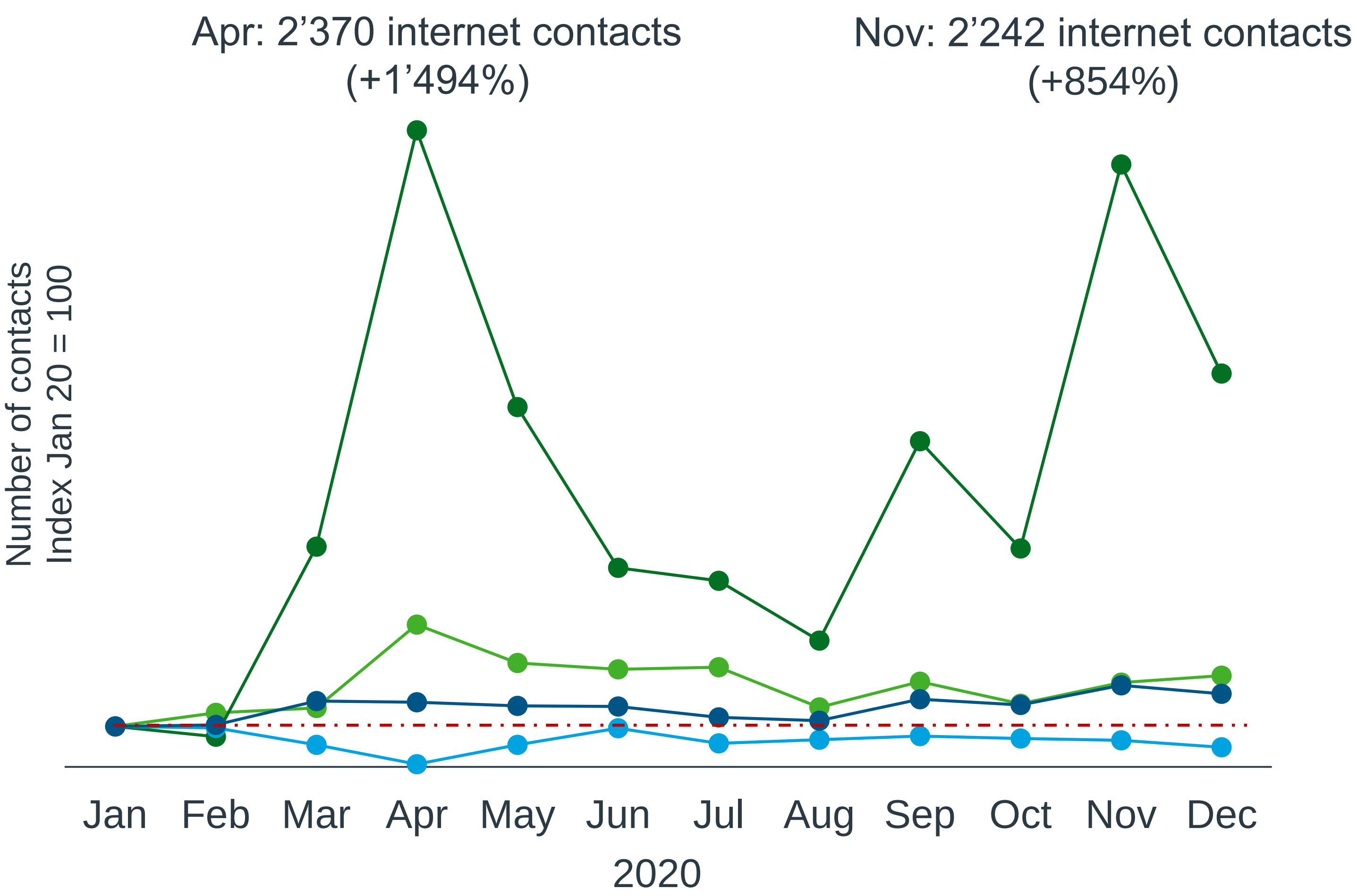
Source: IQVIA NSD Prescriber

Throughout 2020, fewer face to face visits were conducted and the shift to internet contact remains sustainable

Digital contacts increased by +119% in 2020



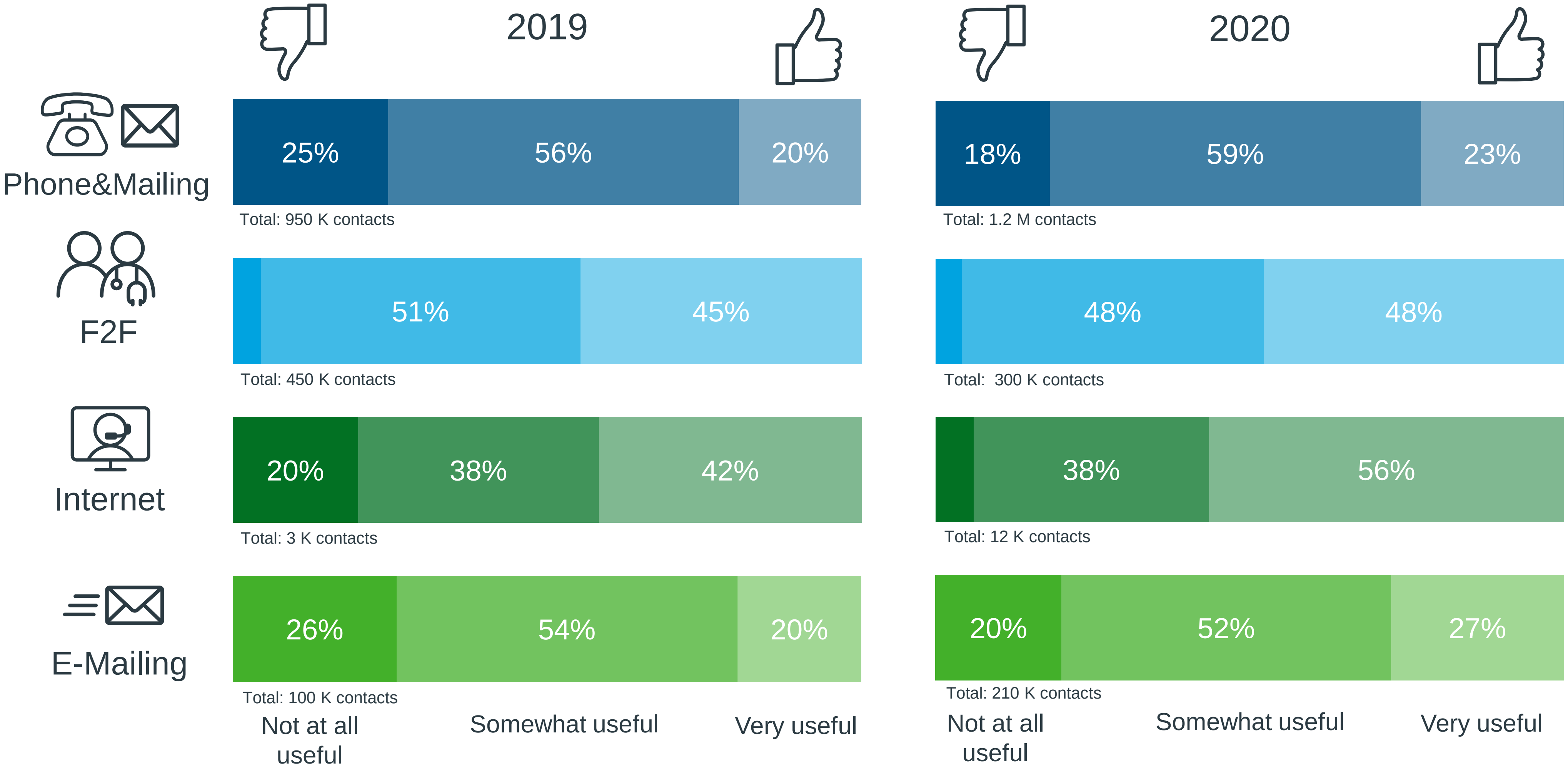
Contacts through live or self-guided internet presentations show the biggest increase in 2020



Source: IQVIA Channel Dynamics Switzerland

Also, digital contacts become more populare and useful

The biggest change can be seen in internet detailing: only 6% are rated as not usable in 2020



Source: IQVIA Channel Dynamics Switzerland

Pharmamarket Switzerland 2020
and the Influence of the Corona Pandemic

+ Overall market development and key drivers
+ Impact of COVID-19
+ SL market with protected and off patent sectors
+ Outlook for 2021 with two possible scenarios

The SL market grows at +4.3%, slightly higher than the overall market

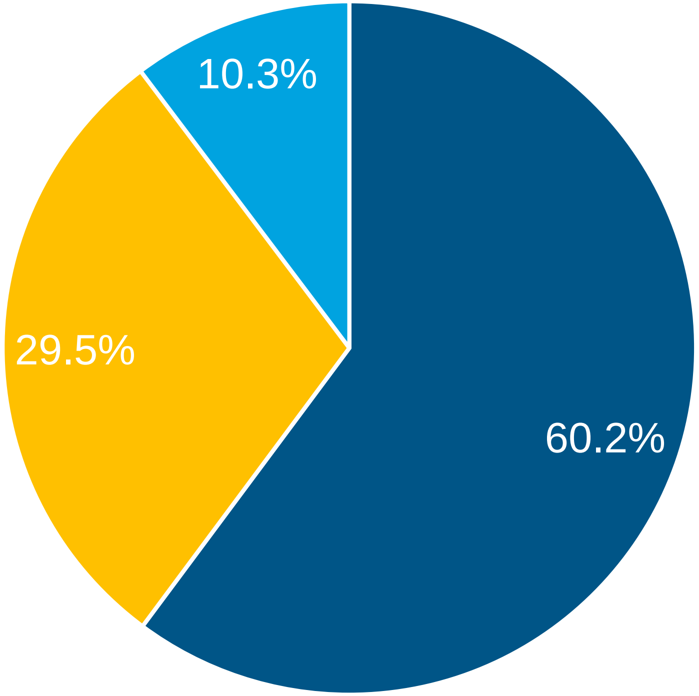
FY 2020

Volume in packs
127.3 M (-0.1 M / -0.1%)

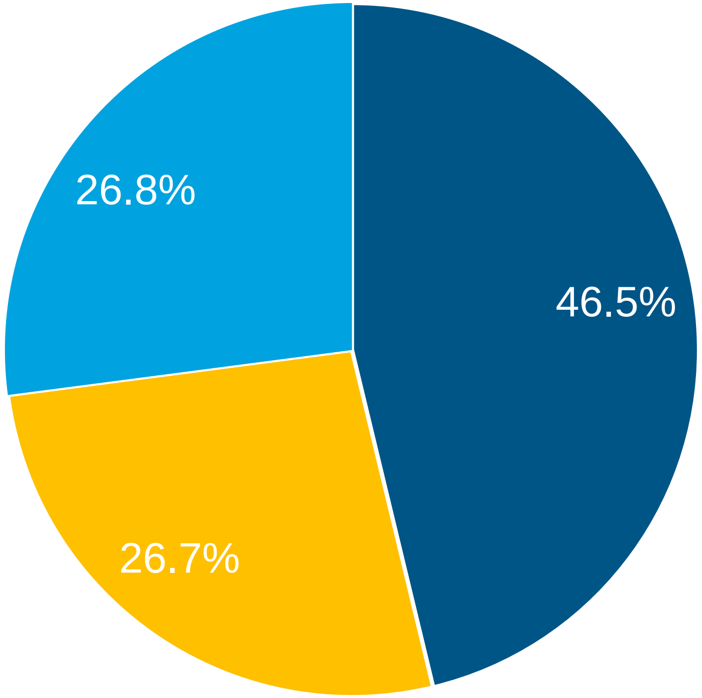
Hospitals
13.1 M
-0.5 M
-3.4%

Pharmacy
76.6 M
+1.3 M
+1.8%

Doctors
37.7 M
-1.0 M
-2.6%



Ex-factory value in CHF
5’419.7 M (+221.8 Mio. / +4.3%)



Hospitals
1’453.3 M
+65.9 M
+4.7%

Pharmacy
2’516.7 M
+89.3 M
+3.7%

Doctors
1’449.7 M
+66.6 M
+4.8%

Source: IQVIA iQPharma, APO/SD/SPI, SL Market, monthly accrued

Patented products develop at +4.6%, similar to the SL market (+4.3%) Reference products grow due to increase in number, sales are negative

Ex-factory value SL market CHF 5'419.7 M (+221.8 M / +4.3%) *FY 2020*

Protected Products
2'600.4 M
(+113.2 M / +4.6%)

Off-Patent
557.0 M
(-45.8 M / -7.6%)

Originals
673.9 M
(-20.3 M / -2.9%)

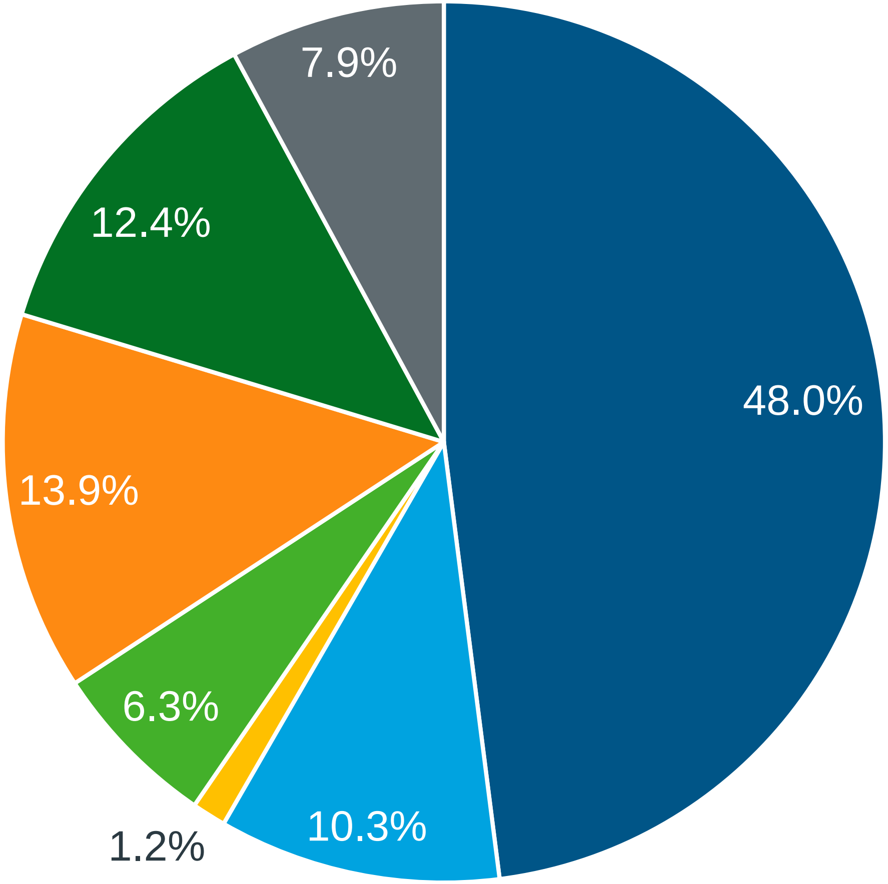
Reference Products
339.9 M
(+125.7 M / +58.7%)

Generics
753.6 M
(+8.9 M / +1.2%)

Biosimilars
67.6 M
(+23.6 M / +53.6%)

Out of Market*
427.3 M
(+16.5 M / +4.0%)

*natural substance (e.g. minerals, vitamins, herbal ingredients) and vaccines



Source: IQVIA iQPharma, APO/SD/SPI, SL Market, monthly accrued

Biologic competition is increasing: more biosimilars are on the market for more reference products

Reference products sales are declining and biosimilar shares are rising

Number of reference products

patent biologics with at least on biosimilar competitor

2019 **12** 2020 **15**

Number of biosimilars

2019 **18** 2020 **29**

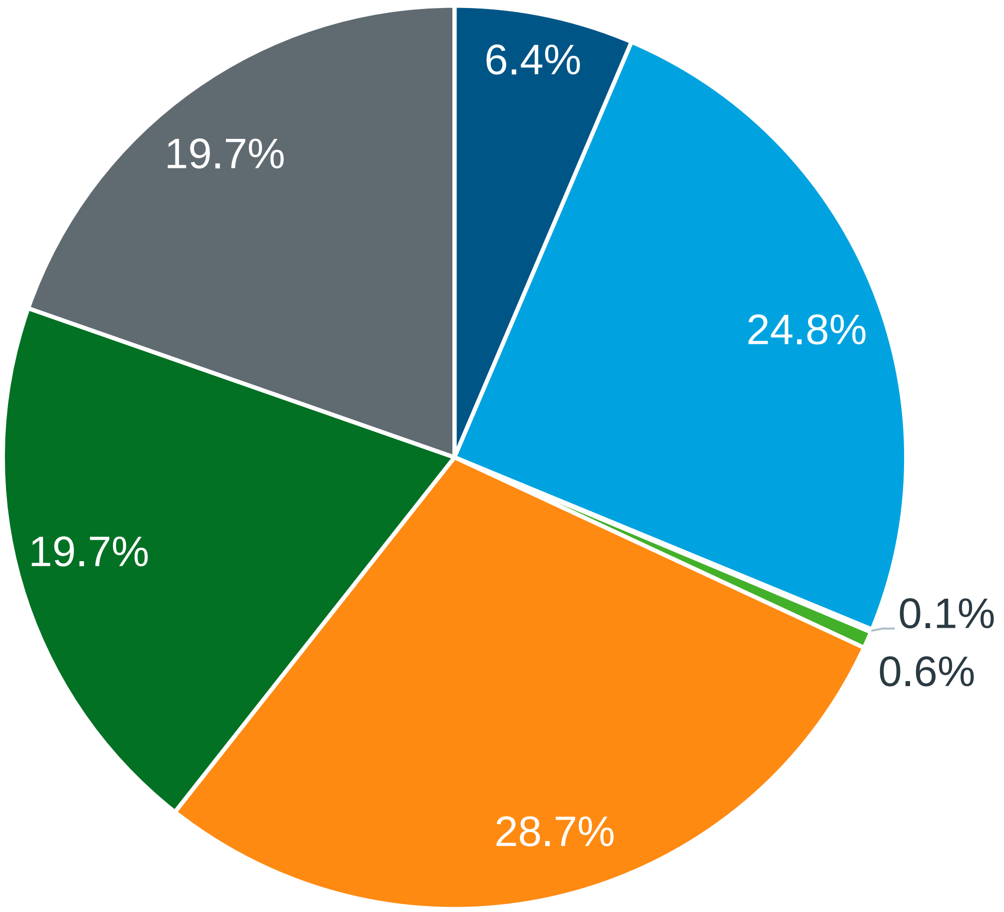
Biosimilar value market share over all molecules with biosimilar competition is currently at **17%**

The patent has expired on ¾ of all packs sold in the SL market

Pack volume SL market 127.3 M (-0.1 M / -0.1%) *FY 2020*

Protected Products 8.2 Mio. (+0.2 M / +3.0%) Ø CHF 313.77	Off-Patent 31.6 Mio. (-0.5 M / -1.6%) Ø CHF 18.78
Originals 25.1 Mio. (-1.0 M / -3.9%) Ø CHF 26.56	Reference Products 0.8 Mio. (+0.3 M / +61.7%) Ø CHF 451.48
Generics 36.5 Mio. (-0.6 M / -1.6%) Ø 20.06 CHF	Biosimilars 0.1 Mio. (+0.0 M / +53.9%) Ø CHF 513.19
Out of Market* 25.0 Mio. (+1.4 M / +6.0%) Ø CHF 17.41	

*natural substance (e.g. minerals, vitamins, herbal ingredients) and vaccines



Patent expired = Off-Patent, Originals, Reference Products, Generics and Biosimilars

Source: IQVIA iQPharma, APO/SD/SPI, SL Market, monthly accrued

IQVIA

Pharmamarket Switzerland 2020 and the Influence of the Corona Pandemic

- Overall market development and key drivers
- Impact of COVID-19
- SL market with protected and off patent sectors
- Outlook for 2021 with two possible scenarios

One possible outlook for 2021 if COVID-19 remains challenging

	Q1	Q2	Q3	Q4
Challenging scenario	Lower availability of vaccines and/or limited efficacy. Assuming mutations lead to much higher infectivity and more severe disease progression.		After a short break in summer again more COVID-19 cases which lead to strict measures including possible lockdown	
	Reduction in certain cantons of non-emergency operations resulting in continued slowed growth	**Further restrictions** for hospitals on non-emergency procedures Heavily loaded emergency departments, remaining occupancy below average	**Slow catch-up** for delayed operations and check ups **Increased cases of late cancer detection** and others due to missed screenings	Again **similar conditions as in the previous year**: hardly any or fewer standard operations, emergency business. Overall **reduced growth** in hospital channel.
	Reduced doctors visits due to fear of COVID-19 infection continues	**Doctor visits continue to decline** because access is being restricted by authorities and/or fear of COVID-19 infection **Further decline of broad indications**	**Slow catch-up** for delayed check ups but **still low sales on common indications**	Again **similar conditions as in the previous year:** Fewer doctors visits generate **overall reduction**
	Weak cold & flu business continues as seen in Q4 2020	**Ongoing need for self-prevention** Continued high sales of immunostimulants / vitamins Increasing demand for non Rx antidepressants		Another **weak cold & flu business**

And a more optimistic outlook for 2021

	Q1	Q2	Q3	Q4
Optimistic scenario	Vaccination continues as planned and is also effective for mutations. Virus spread remains under control even after lockdown. By summer, majority of people are vaccinated.		No further increase of cases due to herd immunity (vaccination or exposure).	
	Reduction in certain cantons of non-emergency operations	**No restrictions** for performed operations and **catching up** on delayed procedures **Increased cases of late cancer detection** and other indications due to missed screenings **Normalized access to doctors,** delayed launches of new products will start now		
	Reduced doctors visits due to fear of COVID-19 infection continues	**Normalized access to doctors** **Broad indications regain growth** **Catching up** on preventive medical check-ups		Normal or above-average cold & flu business
	Weak cold & flu business Low spread of general cold viruses continues as seen in Q4 2020	**Declining demand for immunstimulants / vitamins** **Normalized use of analgetics and wound care products**		Likely **above-average business with flu & cold products**

Thank you for your attention!

For more IQVIA insights and thought leadership reports on COVID, visit our COVID-19 Healthcare Insights and Resources page on: iqvia.com

A time for action: fighting COVID-19

COVID-19 has created both immediate and long-term consequences for people and systems around the world. At IQVIA, we want you to have what you need to understand the impact, join the fight, and keep healthcare moving forward. We are here to help.

Staying informed, and empowered

During times of uncertainty and disruption, information and analytics provide a steadying force. A counterbalance to panic. We have mobilized resources and capabilities across our business and around the world to ensure you have what you need to understand our new reality, and make strong, informed decisions.

Join our next Webinar in May 2021

Appendix

Market definition for oncology, autoimmune and antiviral products

Oncology				Autoimmune	
L01A	Alkylierende Substanzen	L02B2	Cytostatische Hormon-antagonisten Anti-Androgene	N07A	Produkte gegen Multiple Sklerose
L01B	Antimetaboliten	L02B3	Cytostatische Aromatasehemmer	L04B	Anti-TNF Produkte
L01C	Vinca-Alkaloide & sonstige pflanzliche Produkte	L02B9	Sonstige Hormonantagonisten	L04C	Interleukin Inhibitoren (Stelara, Cosentyx)
L01D	Antineoplastisch wirkende Antibiotika	L03A1	Koloniestimulierende Faktoren	A07E	Produkte gegen Darmentzündungen (Stelara, Mezavant)
L01F	Platinhaltige Antineoplastika	L03A9	Alle sonstigen Immunstimulantien ohne MS	L04X	Sonstige Immunsupressiva (Otezla)
L01G	Monoklonale Antikörper zur antineoplastischen Therapie	L03B1	Alpha-Interferon	N07X	Alle anderen ZNS-wirksamen Präp (Sativex, Fampyra)
L01H	Proteinkinasehemmer zur antineoplastischen Therapie	L04X	Sonstige Immunsuppressiva (Revlimid)	M01C	Spezifische Antirheumatika (ohne Tee, Homöopathie Präp.)
L01X1	Adjuvantien und pflanzlichen Präparate in der Krebstherapie	B01C4	Cyc.Amp.Erhoeh.Th.Agg.Hemm (Xagrid, Thromboreduction)	D05B	Antipsoriatika systemisch
L01X9	Alle sonstigen Antineoplastika	D06D9	Sonst.Topische Prod. gegen Viruserkrankungen (Aldara)	**Antiviral**	
L02A2	Cytostatische Hormone Gestagene	M05B9	Sonst. Ca-Regulatoren (Xgeva)	J05B	Antivirale Mittel exklusiv HIV
L02A3	Gonadotropin-Releasing-Hormon-Analoga	V03C	Radiopharmaceutica (Xofigo)	J05C	Virustatika gegen HIV
L02B1	Cytostatische Hormonan-tagonisten Anti-Estrogene	V03D	Entgiftende Präp. Cyto. Therapie	J05D	Antivirale Mittel gegen Hepatitis
		M04A	Gichtmittel (Fasturtec)		

Definition Patentgeschützer Markt, Originale und Generika sowie Referenzprodukte und Biosimilars

Protected Products
Products with existing patent (chemical + biological)

Off-Patent
Products with expired patent, without imitation products (chemical+biological)

Originals
Chemical products with expired patent and at least 1 generic product

Reference Products
Biological products with expired patent and at least 1 biosimilar

Generics
Imitation products of an original (chemical)

Biosimilars
Imitation products of a reference product (biological)

Out of market
Non-patentable products such as natural substances and vaccines

Referenceproducts and Biosimilars – December 2020

Molecule	Referenceproduct	Biosimilar
Adalimumab	Humira	Amgevita, Hulio, Hyrimoz, Idacio, Imraldi
Bevacizumab	Avastin	Mvasi, Zirabev
Epoetin alfa	Eprex	Binocrit
Enoxaparin sodium	Clexane, Clexane Multi	Inhixa, Inhixa Multi
Etanercept	Enbrel	Benepali, Erelzi
Filgrastim	Neupogen	Accofil, Filgrastim Teva, Zarzio
Follitropin alfa	Gonal F	Ovaleap
Infliximab	Remicade	Inflectra, Remsima
Insulin glargine	Lantus	Abasaglar
Pegfilgrastim	Neulasta	Pelgraz, Pelmeg, Ziextenzo
Somatropine	Genotropin	Omnitrope
Rituximab	Mabthera	Rixathon, Truxima
Teriparatide	Foresto	Movymia, Terrosa
Trastuzumab	Herceptin	Kanjinti, Trazimera

Products with no sales are not listed

IQVIA

Über IQVIA
IQVIA (NYSE:Q) ist ein führender, globaler Anbieter von Informationen, innovativen Technologielösungen und Serviceleistungen im Bereich der klinischen Auftragsforschung, der Daten und wissenschaftliche Methoden nutzt, um Akteure in der Gesundheitsbranche darin zu unterstützen, bessere Lösungen für ihre Kunden zu finden.

IQVIA entstand durch den Zusammenschluss von IMS Health und Quintiles und bietet ein breites Spektrum an Lösungen, die Fortschritte bei Gesundheitsinformationen, Technologien, Analytik sowie Fähigkeiten und Erfahrungen der IQVIA-Mitarbeiter nutzen, um dem Gesundheitswesen neue Impulse zu geben. IQVIA ermöglicht es Unternehmen, ihre Konzepte von klinischer Entwicklung und Vermarktung zu optimieren, Innovationen im Vertrauen auf den Erfolg zu fördern und die Erzielung aussagekräftiger Resultate zu beschleunigen.

IQVIA beschäftigt rund 65.000 Mitarbeiter in über 100 Ländern, die sich dafür einsetzen, das Potenzial von Human Data Science Wirklichkeit werden zu lassen. IQVIAs Konzept von Human Data Science wird von IQVIA CORE™ angetrieben und liefert auf der Basis umfangreicher Branchenkenntnisse einzigartige Entscheidungsgrundlagen in der Verknüpfung von Big Data, zukunftweisender Technologie und moderner Analytik.

Das umfassende Know-how von IQVIA verhilft Unternehmen aus Biotechnologie, Medizintechnik, pharmazeutischer Industrie und medizinischer Forschung, staatlichen Einrichtungen, Kostenträgern und anderen Akteuren im Gesundheitswesen zu einem tieferen Verständnis von Versorgungsbedingungen, Krankheiten und wissenschaftlichen Fortschritten und unterstützt sie so auf ihrem Weg zu grösseren Behandlungserfolgen.

Weitere Informationen finden Sie auf www.IQVIA.ch.

Disclaimer