

Key Potential Drug Launches in 2020

Take a longer-term look at key late-stage drugs projected to hit the market in 2020, including new drug classes, major changes to standards of care, and/or large market opportunities across the wide range of indications covered by Biomedtracker and Datamonitor Healthcare

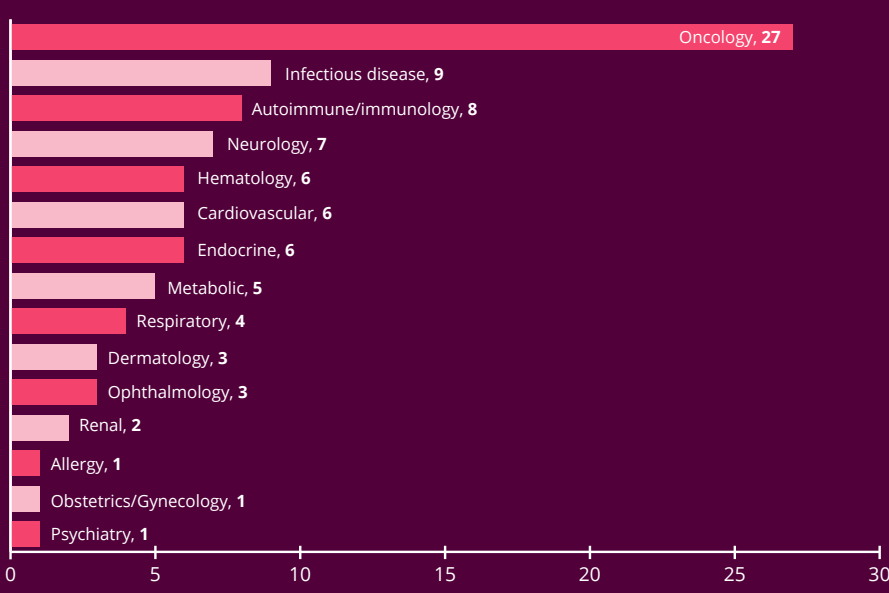
326
Expected Catalysts

85
Key Drugs

64
Companies

69
Indications

Number of Key Drugs Launching per Disease Group

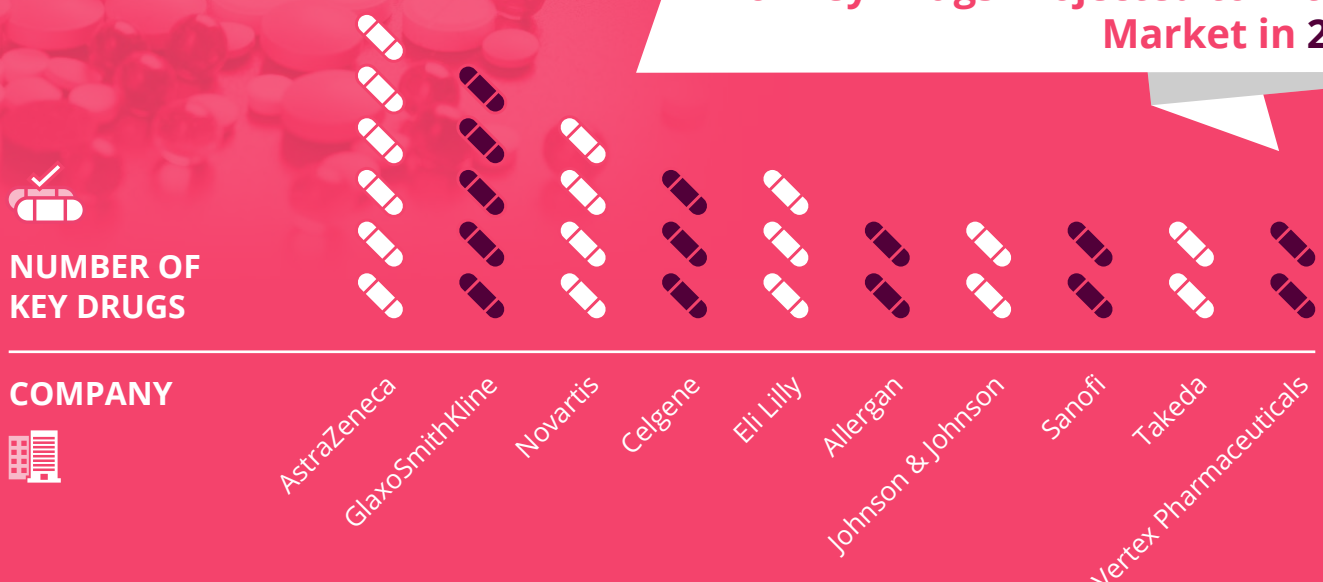


Oncology
has the largest number of key drugs expected to launch in 2020, with **27** drugs across **20** indications

Infectious Disease and Autoimmune/immunology follow, with **9** and **8** drugs, respectively

*Note: Drugs expected to be launched across multiple disease groups are counted for each group

Leading Companies by Number of Key Drugs Projected to Hit the Market in 2020



AstraZeneca is expected to submit filings for **six** drugs across **seven** indications:

Drug	Indication	Expected Date Range	Filing Type	Current Phase	Likelihood Of Approval
Brilinta	Atherosclerosis	Now-12/31/2019	Supplemental Filings for US, EU, Japan	III	52% (5% Above Avg.)
		01/01/2020-12/31/2020	Supplemental China Filing		
Farxiga	Congestive Heart Failure (CHF) and Cardiomyopathies	01/01/2020-12/31/2020	Supplemental Filings for US, Europe, Japan	III	48% (1% Above Avg.)
Roxadustat	Anemia Due to Chronic Renal Failure, Dialysis-Dependent	07/01/2019-12/31/2019	NDA Filing	III	73% (13% Above Avg.)
	Anemia Due to Chronic Renal failure, Dialysis-Independent	07/01/2019-12/31/2019	NDA Filing	III	74% (14% Above Avg.)
Selumetinib	Neurofibromatosis (NF)	07/01/2019-12/31/2019	NDA and MAA Filings	II	17% (Same As Avg.)
Calquence	Chronic Lymphocytic Leukemia (CLL)/Small Cell Lymphocytic Lymphoma (SLL) - NHL	Now-12/31/2019	Supplemental Filings for US and EU - High Risk	III	42% (7% Above Avg.)
		01/01/2020-12/31/2020	Supplemental Filings for US and EU - 1L		
Lynparza	Pancreatic Cancer	07/01/2019-12/31/2019	Supplemental Filings for US, EU, Japan	III	45% (10% Above Avg.)

Brilinta could experience significant uptake on the market in this novel patient population where optimal long-term therapy with dual anti-platelet therapy is not established and use of aspirin alone is considered effective

Farxiga will be the first sodium-glucose cotransporter-2 inhibitor (SGLT-2i) to be approved by the FDA for heart failure with reduced ejection fraction, a significant unmet need affecting approximately 50% of chronic heart failure patients

Lynparza is set to become not only the first PARP inhibitor approved for pancreatic cancer, but also the first targeted therapy approved for pancreatic cancer since Tarceva was approved in 2005

GlaxoSmithKline is expected to submit filings for **five** drugs across **five** indications:

Drug	Indication	Expected Date Range	Filing Type	Phase	Likelihood Of Approval
Cabotegravir LAP	HIV / AIDS	Now-06/30/2019	Filing for Approval (Canada)	NDA	94% (6% Above Avg.)
		Now-09/30/2019	MAA Filing - w/Rilpivirine		
Dostarlimab	Uterine (Endometrial) Cancer	07/01/2019-12/31/2019	BLA Filing	I	10% (4% Above Avg.)
GSK2857916	Multiple Myeloma (MM)	07/01/2019-12/31/2019	NDA Filing	II	14% (4% Above Avg.)
Zejula	Prostate Cancer	Now-12/31/2019	Supplemental Filings for US and EU	III	39% (4% Above Avg.)
Trelegy Ellipta	Asthma	10/01/2019-12/31/2019	Supplemental Filings for US and Europe	III	71% (3% Above Avg.)

Cabotegravir, in a fixed-dose combination with Johnson & Johnson's rilpivirine, is anticipated to be the first long-acting injectable to enter the HIV market, which could generate blockbuster sales by 2024 (if approved)

GSK2857916, an antibody-drug conjugate (ADC) directed towards B-cell maturation antigen (BCMA), is a unique drug in the multiple myeloma space where no ADCs or BCMA-directed therapies are currently approved

Zejula appears to be one of the first PARP inhibitors projected to gain approval for prostate cancer, competing with three other PARP inhibitors in Phase III development