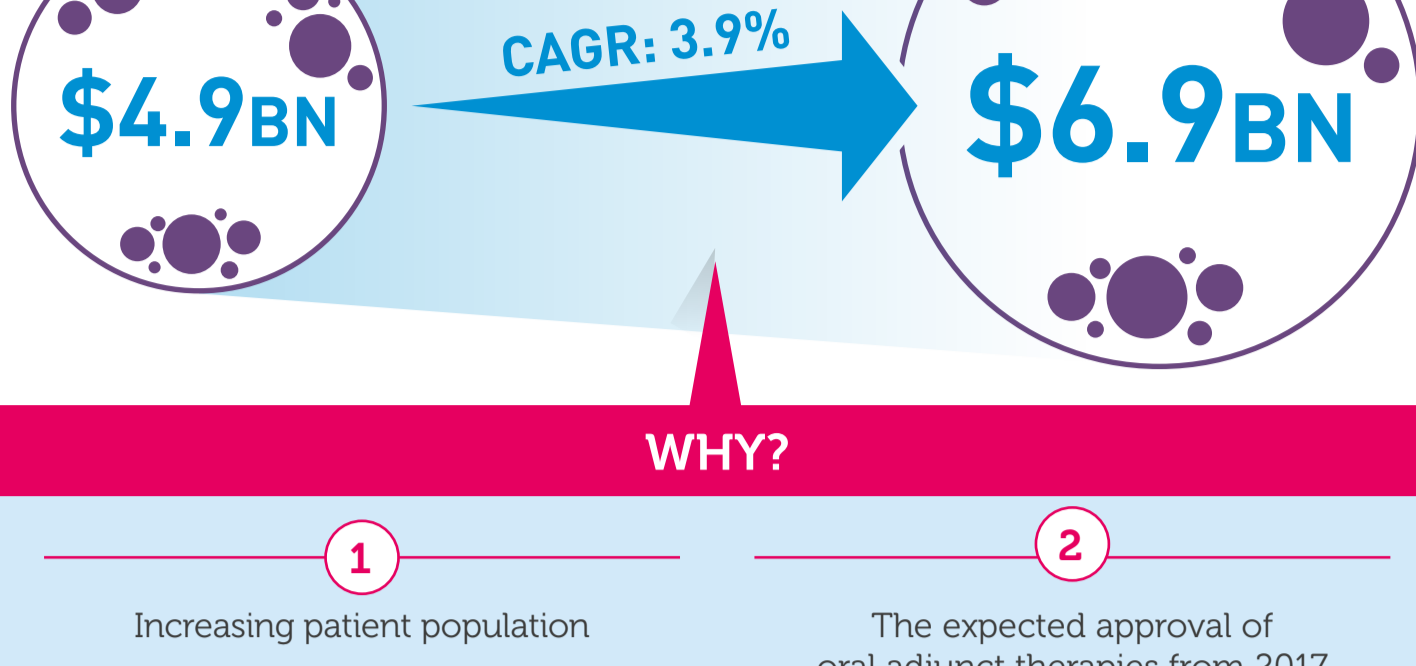


## Future Market Dynamics in Type 1 Diabetes

The value of the type 1 diabetes market in the US, Japan, and five major EU markets (France, Germany, Italy, Spain, and the UK) will be hampered by the launch of biosimilar versions of leading insulin analogs. Our coverage allows you to analyse every aspect of this market.

### Market Value

The value of the type 1 diabetes market will experience moderate growth over the 2015–24 forecast period, increasing in value from \$4.9bn to \$6.9bn at a compound annual growth rate (CAGR) of 3.9%.

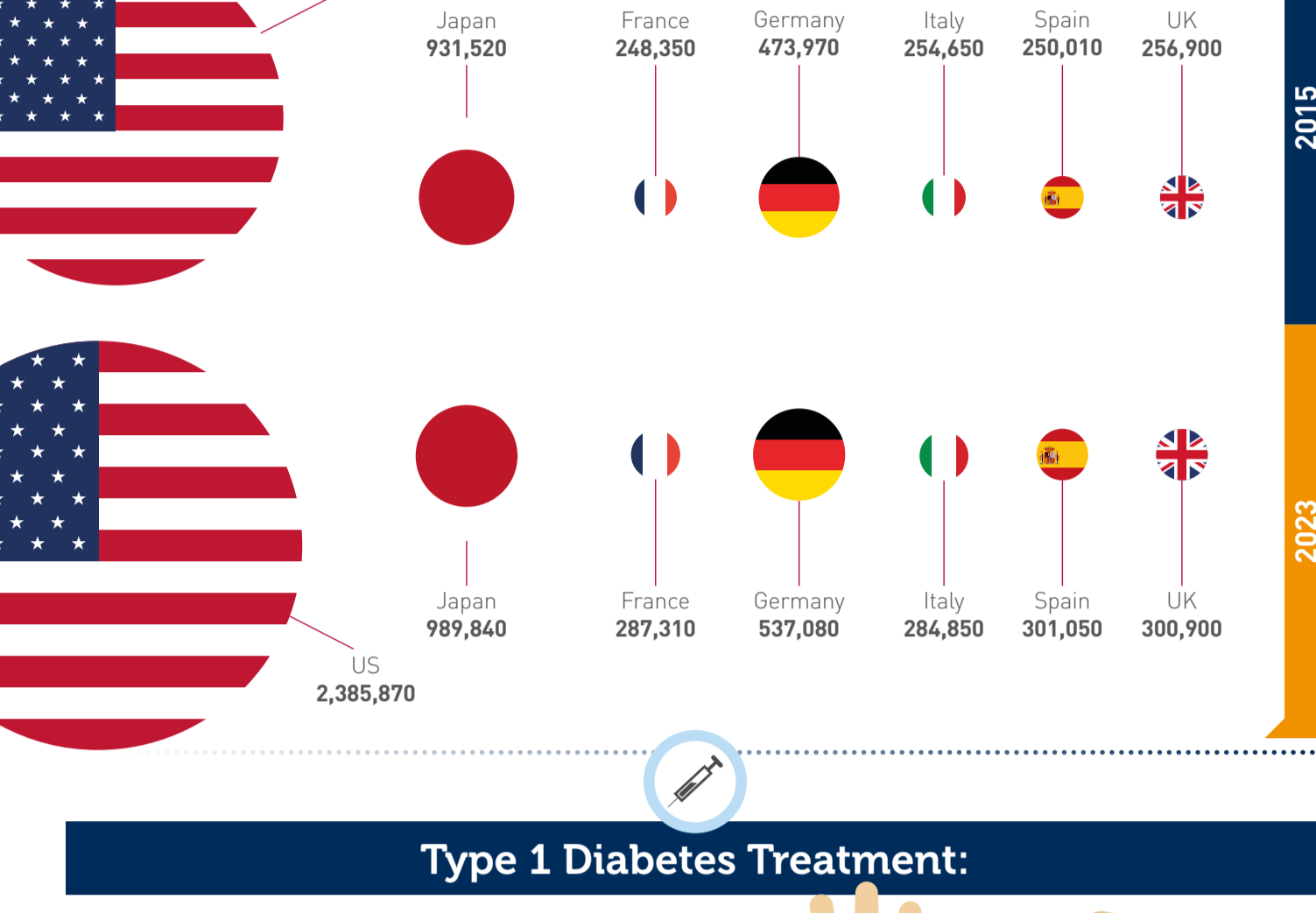


### WHY?

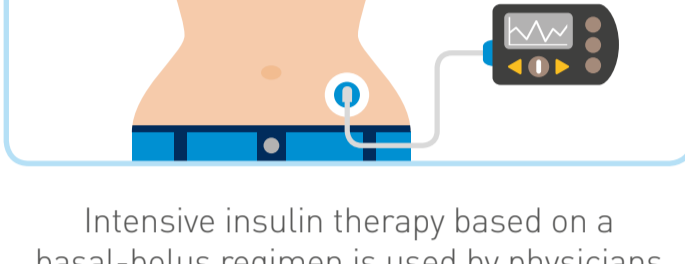
1 Increasing patient population

2 The expected approval of oral adjunct therapies from 2017

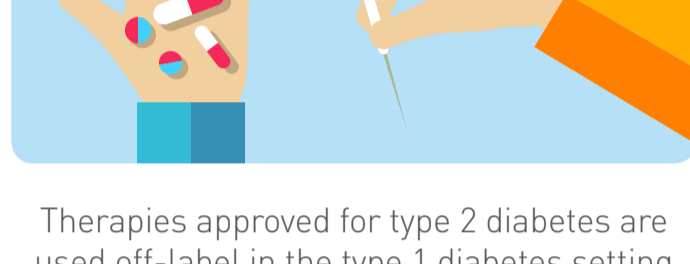
### Total prevalent cases of type 1 diabetes in ≥20 year-olds in the US, Japan, and five major EU markets



### Type 1 Diabetes Treatment:



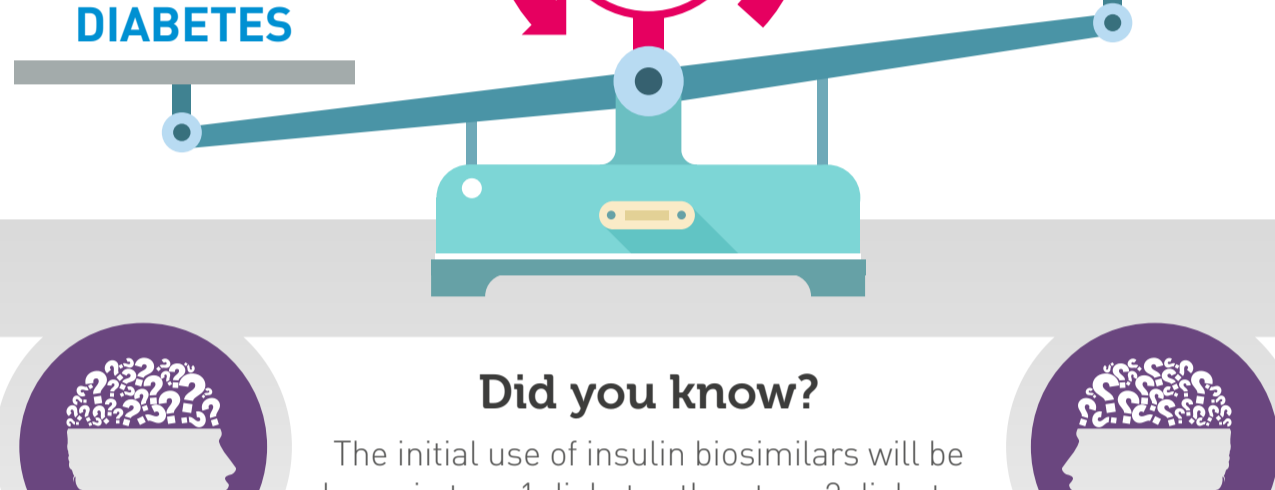
Intensive insulin therapy based on a basal-bolus regimen is used by physicians to treat the majority of their type 1 diabetes patients



Therapies approved for type 2 diabetes are used off-label in the type 1 diabetes setting

### Type 1 Diabetes Future Treatment:

Biosimilars will initially be used in newly diagnosed type 1 diabetes patients. The rate of biosimilar switching will be lower than in the type 2 diabetes space.



### Did you know?

The initial use of insulin biosimilars will be lower in type 1 diabetes than type 2 diabetes

### WHY?

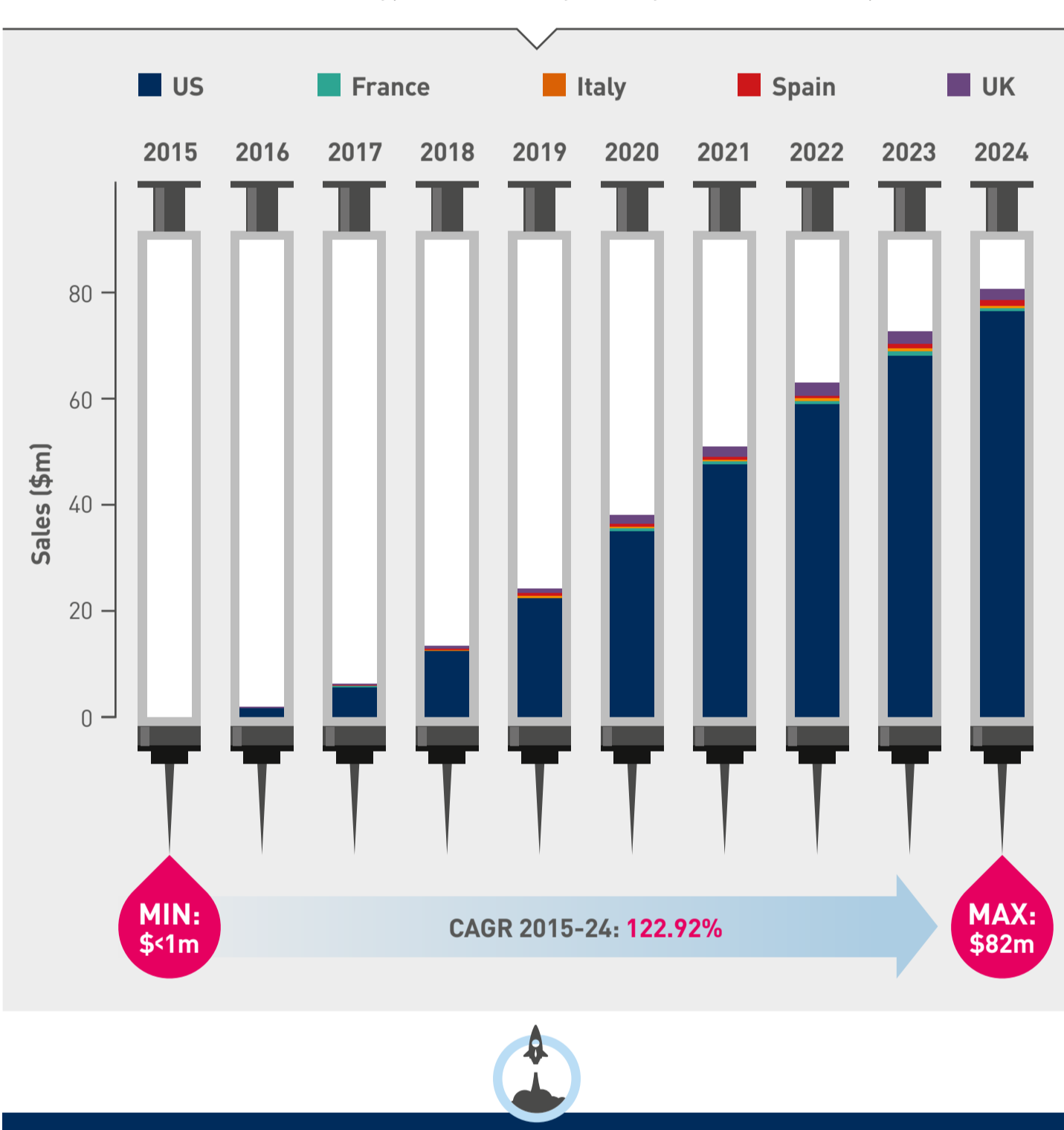
1 The more delicate state of glycemic control in type 1 diabetes

2 The total cost of therapy

### In the Spotlight: Afrezza (inhaled human insulin)

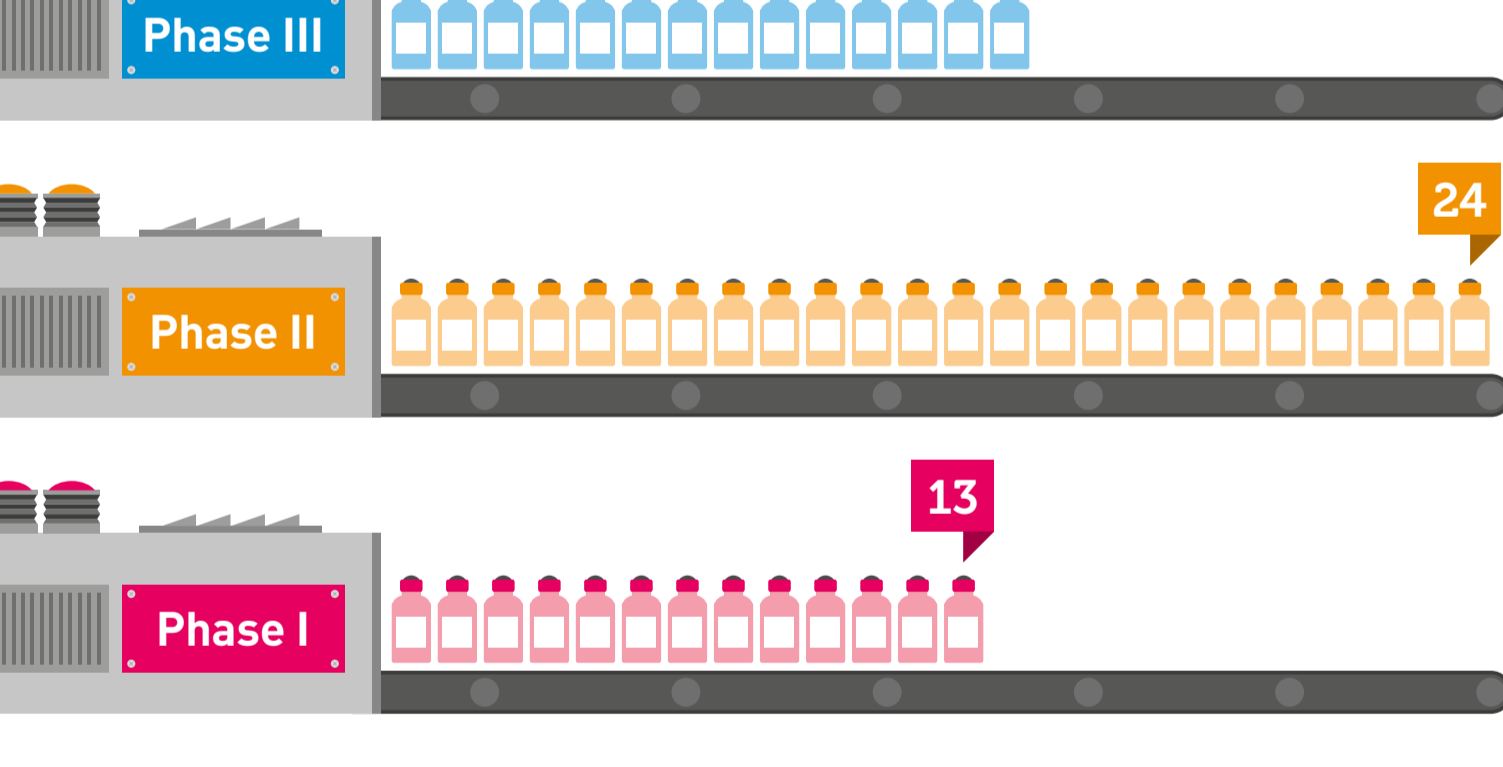
#### Afrezza forecast, 2015–24:

Forecast of Afrezza in type 1 diabetes, by country, over the forecast period.

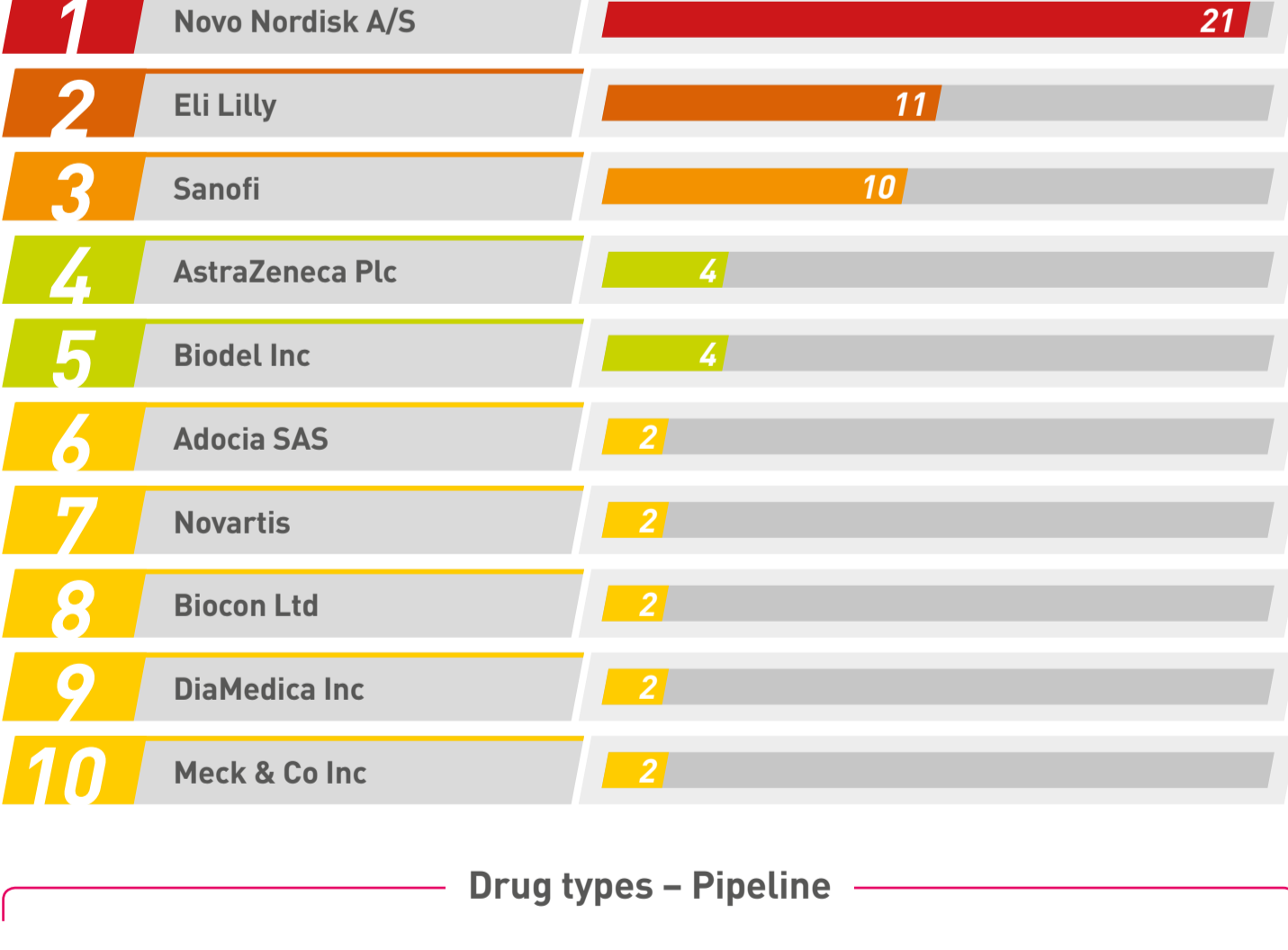


### Pipeline Launches - Diabetes Mellitus, Type 1:

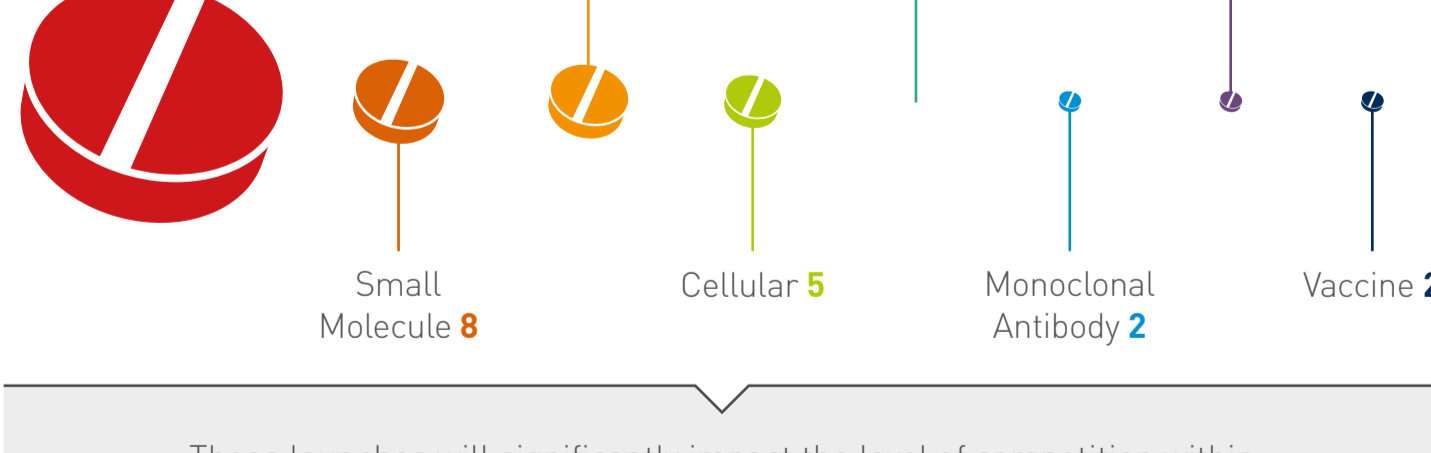
#### Pipeline and Suspended Drugs



#### Top 10 Companies – Pipeline



#### Drug types – Pipeline



These launches will significantly impact the level of competition within the type 1 diabetes market:



### Insulin Therapy Prescribing Factors:

Physicians across the US, Japan and five major EU markets (France, Spain, Germany, Italy and the UK) have rated the following as their top 10 factors for prescribing insulin therapy.

