



**Combine the strengths of Trialtrove & Datamonitor Healthcare to
ENSURE YOUR SUCCESSFUL ENTRANCE INTO THE ULCERATIVE
COLITIS MARKET IN THE 7 MAJOR MARKETS***

*7 major markets include the US, Japan and 5 major EU
markets (France, Germany, Italy, Spain and the UK)



Understand Your Market:

Data Supplied by Datamonitor Healthcare [April 2015]

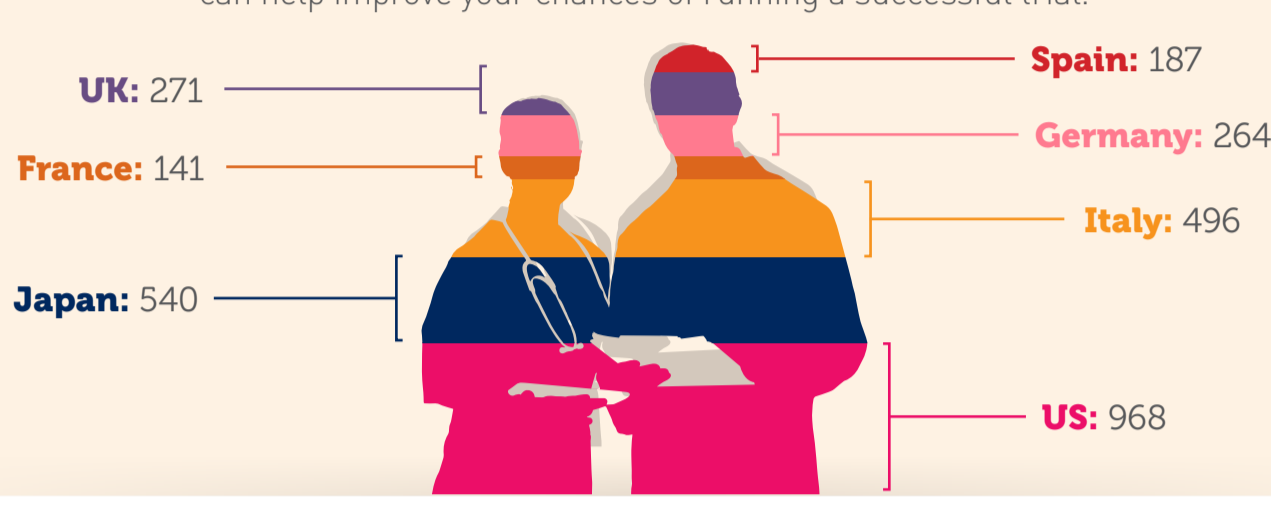
Ulcerative colitis is one of the two dominant forms of inflammatory bowel disease (IBD) with prevalent cases of the disease set to rise worldwide. With this in mind, where would be the best location to focus your trial? Knowing your patient potential and the number of investigators by region will help you focus your target list.



Number of Investigators:

Data Supplied by Siteprove [July 2015]

Qualified investigators with direct experience recruiting patients for Ulcerative Colitis trials can help improve your chances of running a successful trial.



Understand Your Competition:

Data Supplied by Trialtrove [July 2015]

Knowing your competition and understanding their progress is vital if you want to successfully compete in this market.

Top 12 companies with ongoing trials for Ulcerative Colitis

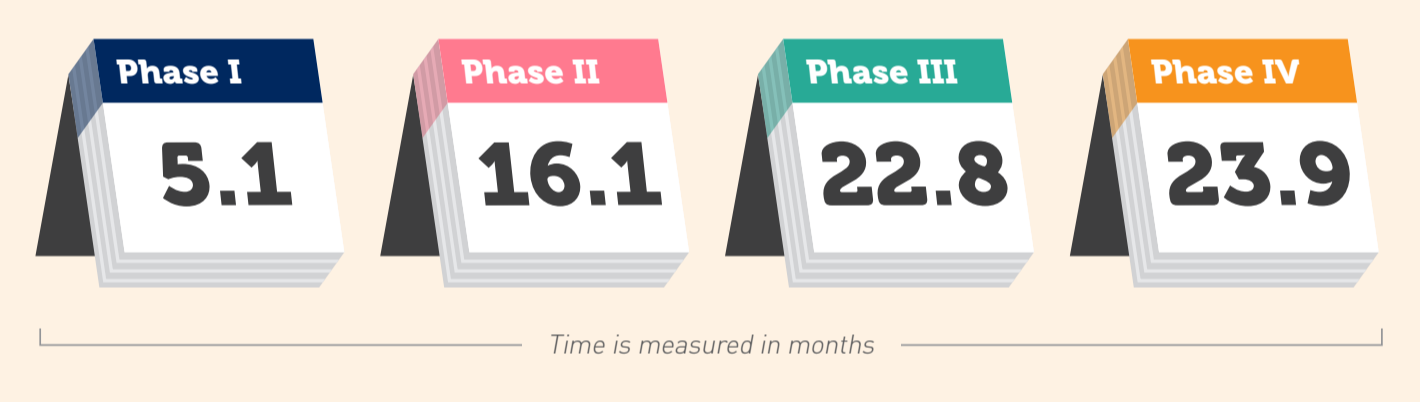
Company	Phase I	Phase II	Phase III
Pfizer	4	2	2
Roche	0	1	5
Dr Falk Pharma	0	2	3
Takeda	1	1	3
AbbVie	0	1	2
Johnson & Johnson	1	2	1
Amgen	1	2	0
Ajinomoto/Kissei	0	0	2
Zeria	0	0	2
Baxter International	1	1	0
Celgene	1	1	0
Merck KGaA	2	0	0



Preparing Your Timeline:

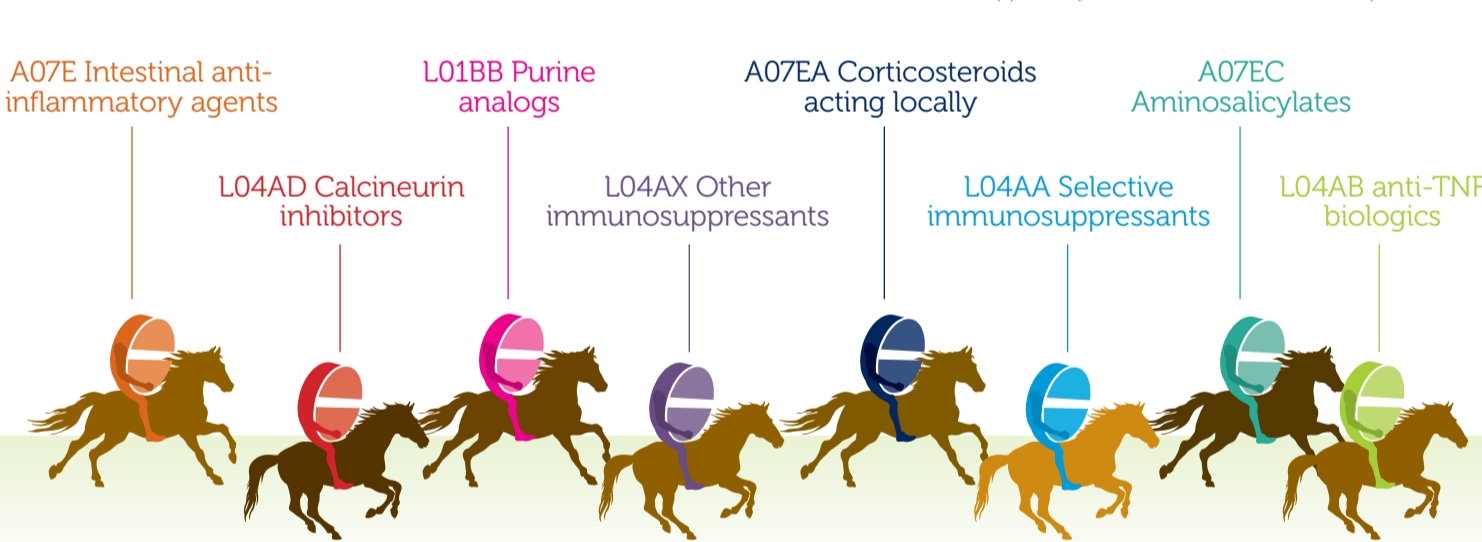
Data supplied by Trialtrove [July 2015]

Part of your entrance strategy will include timelines, which is where we come in. Prepare your strategy effectively by understanding average enrolment period by month for each phase of industry sponsored trials.



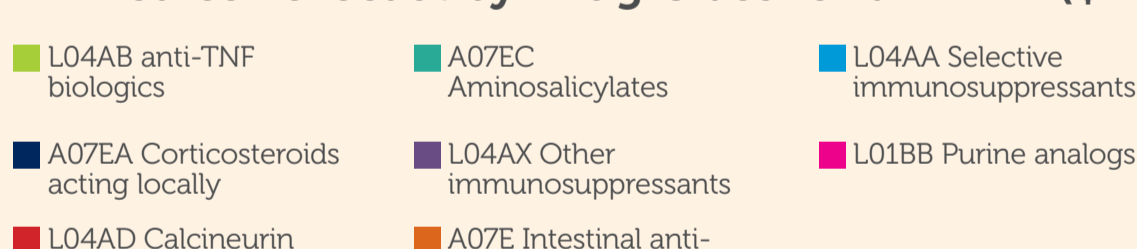
Understand the Future of Ulcerative Colitis Treatments:

Data Supplied by Datamonitor Healthcare [April 2015]

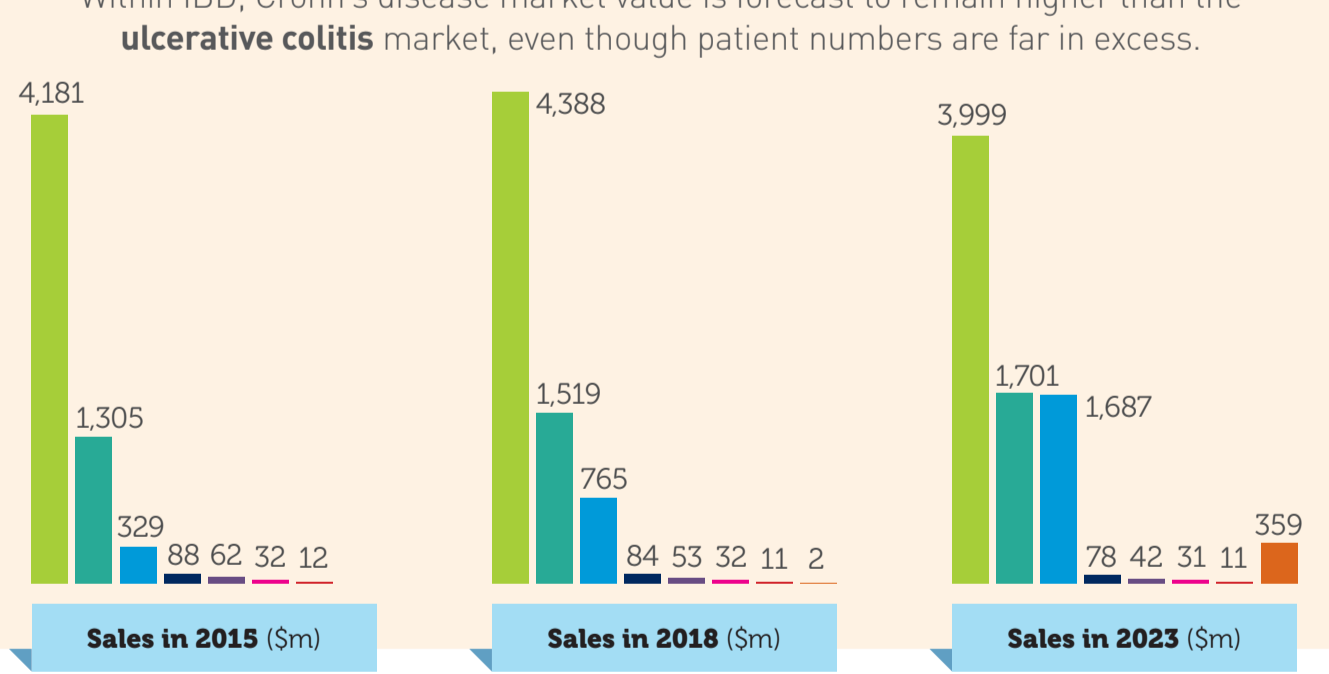


Despite the expected erosion of sales of top-selling anti-tumor necrosis factor (TNF) biologics due to biosimilar competition, total revenues of branded biologics will exceed 2014 revenues. This is due to future product launches offsetting any lost revenue.

Sales Forecast by Drug Class for all 7MM (\$m)



Within IBD, Crohn's disease market value is forecast to remain higher than the ulcerative colitis market, even though patient numbers are far in excess.

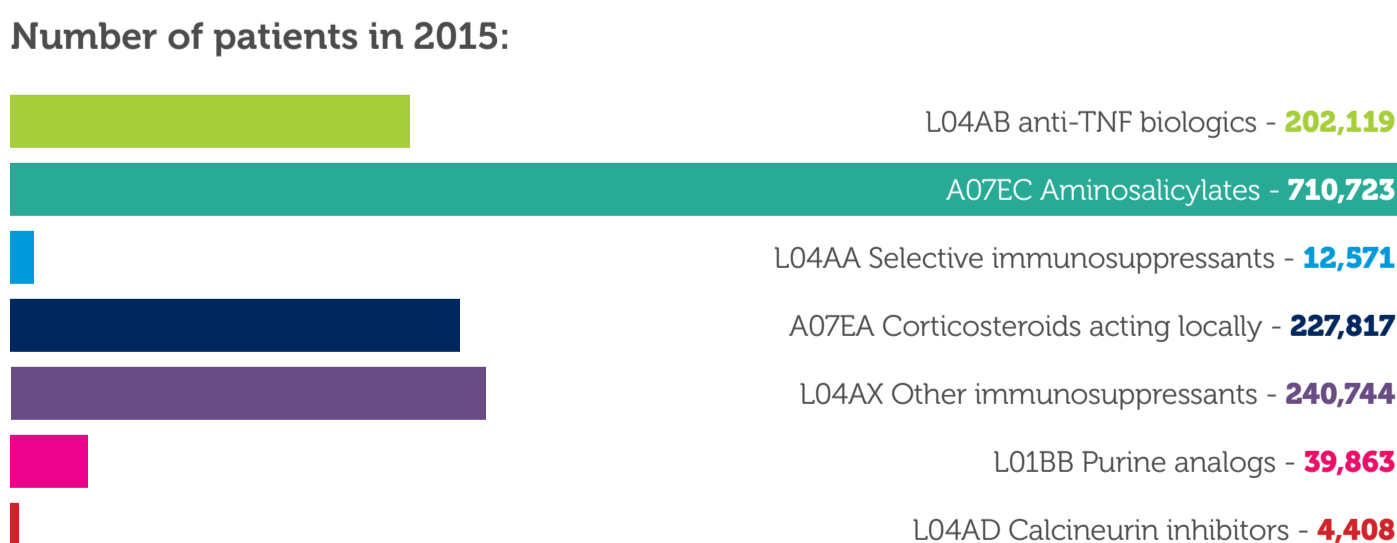


Potential Patient Share:

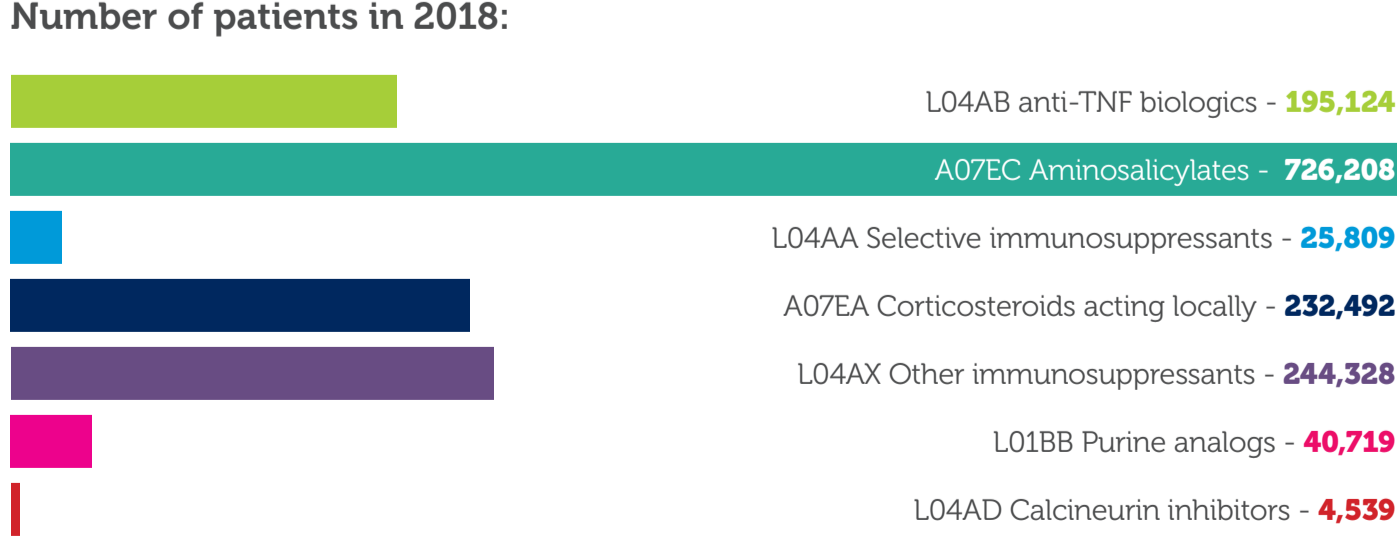
Data Supplied by Datamonitor Healthcare [April 2015]

Use detailed patient-based forecasts to model potential patient share for your new drug candidate by class and understand how classes will alter the landscape of ulcerative colitis treatment trends by 2023.

Number of patients in 2015:



Number of patients in 2018:



Number of patients in 2023:

