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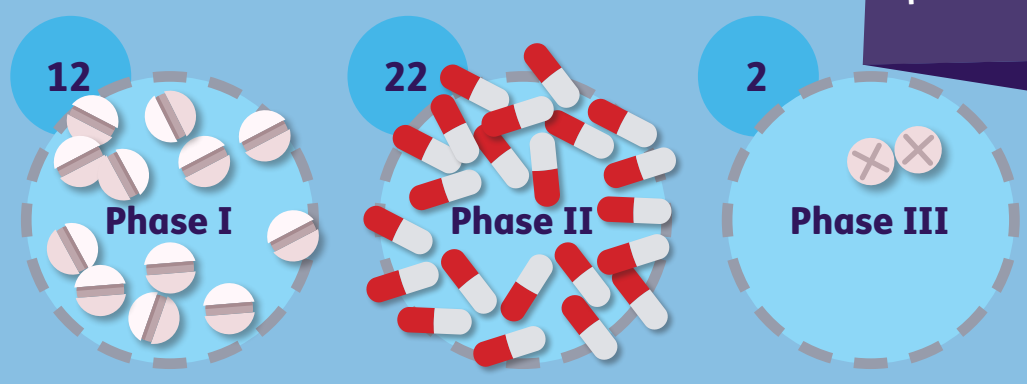
Pharma intelligence | informa

Approval of the first medications targeting NASH patients will increase the value of the market to over US$7.5bn in 2025

Number of drugs in each phase of development

There are currently NO approved pharmacological treatments for NASH



Ocaliva (Intercept) has the potential to become the first approved pharmacological therapy in NASH

Elafibranor (Genfit) is in Phase III of development: Has been shown to provide cardiovascular benefits in it's Phase IIb study

Ocaliva is the only other Phase III compound: Has been shown reduce fibrosis in the Phase II FLINT trial

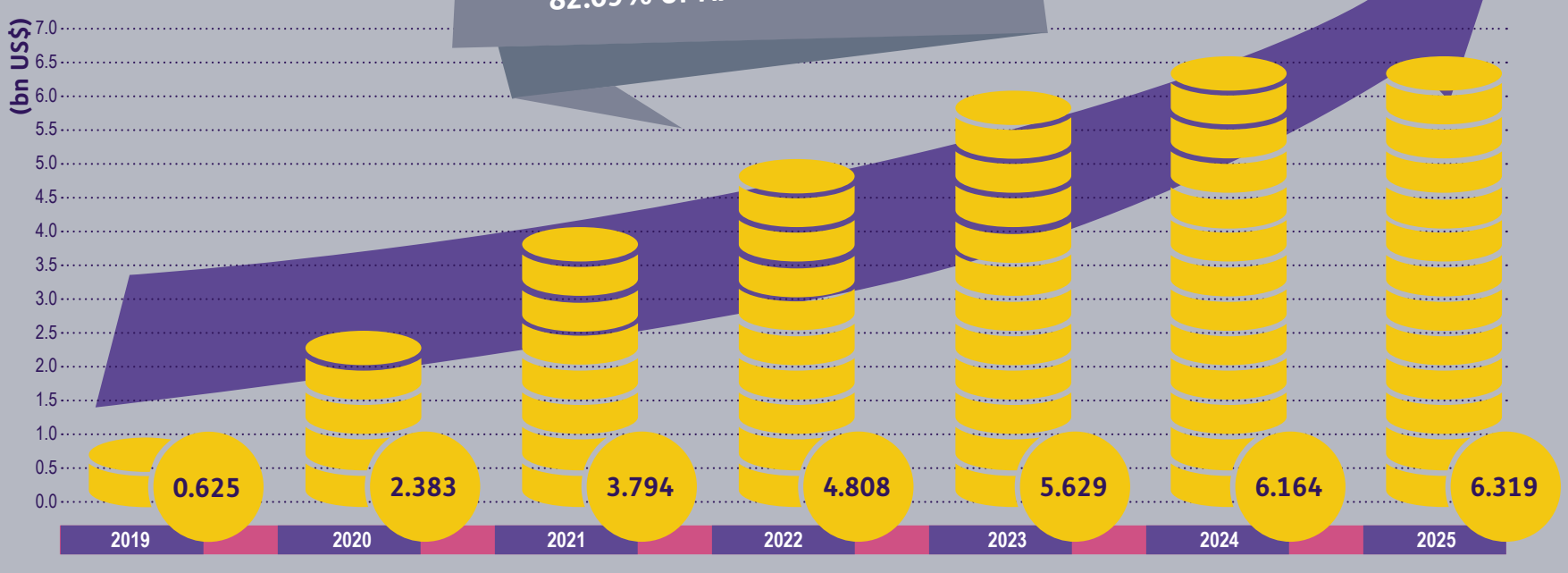
Gilead has a number of compounds in development at various stages of development.

US Approvals

The first US approval will be for Ocaliva in Q1 2019; this approval will be followed by elafibranor in Q3 2019.

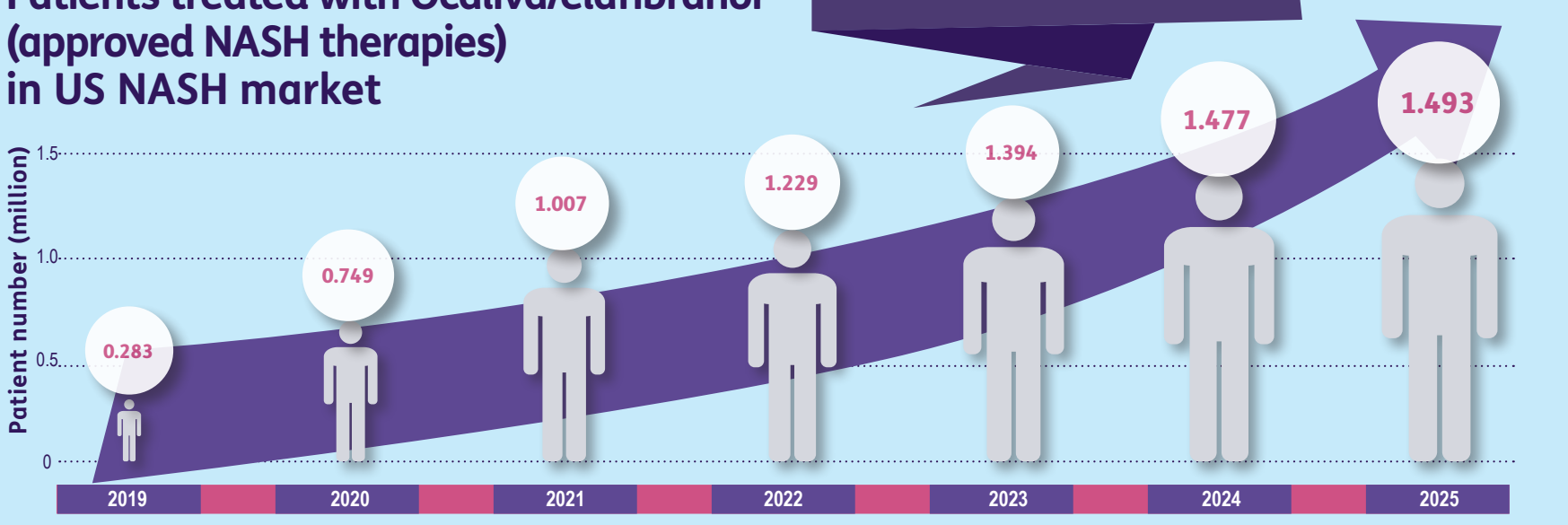
Increase in sales in US NASH market

The US market will account for 62.37% of NASH patients and 82.69% of NASH sales by 2025



Patients treated with Ocaliva/elafibranor (approved NASH therapies) in US NASH market

Uptake of the pipeline medications is expected to be greatest in patients with stage 2 and 3 fibrosis



2025 NASH Sales by country in US Dollars